BEACON SAP Training

# Advanced Create and Maintain Employee Data PA410

SLIDE 1

State of North Carolina
Office of the State Controller

**Notes:**

## Prerequisites

- BEACON Overview BC100
- BEACON SAP Basic Navigation BC110
- Personnel Administration Overview PA200
- Personnel Administration Terms, Concepts, and Display Data PA210
- Create and Maintain Employee Data PA310

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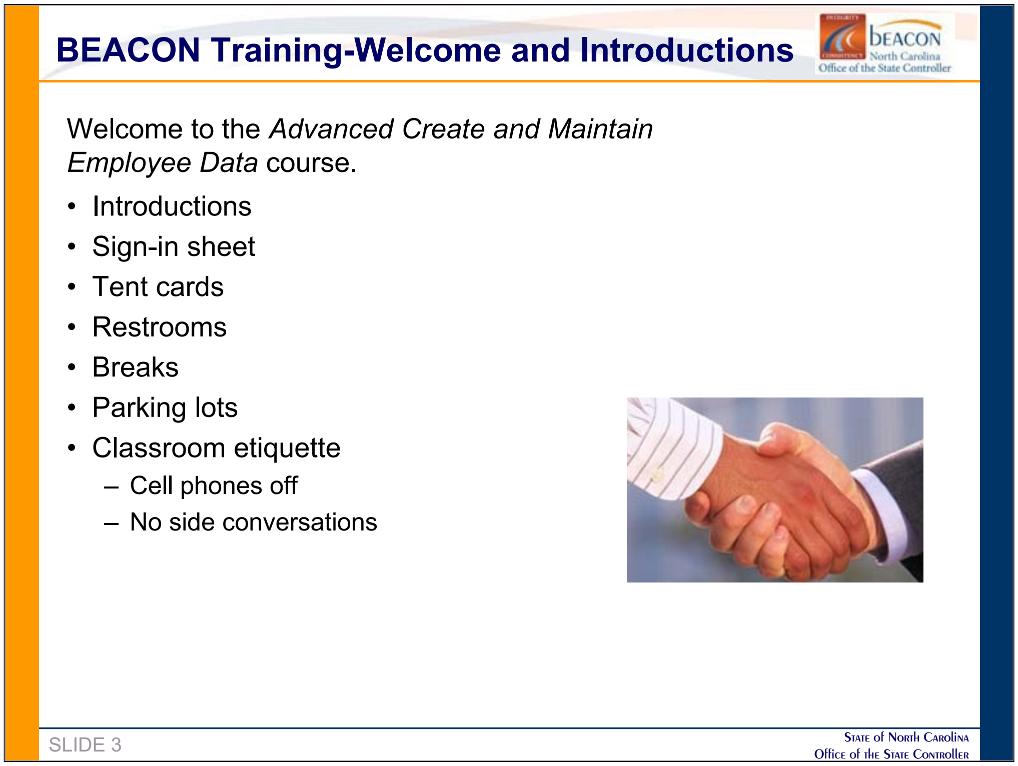
**Notes:**

There are five pre-requisites that you must take before attending this course. Attending these pre-requisites ensures that you are adequately prepared with the new processes, concepts, and terms that are needed for successful completion of the *Create and Maintain Employee Data* course.




**Notes:**

The course introduction is an opportunity to get to know the others who are attending class as well as to agree on classroom courtesy. The Instructor will inform you about the building facilities and when breaks will occur.

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.


Course Map
BEACON
North Carolina
Office of the State Controller
Lesson 1: PA310 Review
Lesson 2: Transfers
Lesson 3: Work Against
Lesson 4: Leave of Absence
Lesson 5: Career Progression
Lesson 6: Reallocation
Lesson 7: Dual Employment
Lesson 8: Additional Actions
Lesson 9: Course Review
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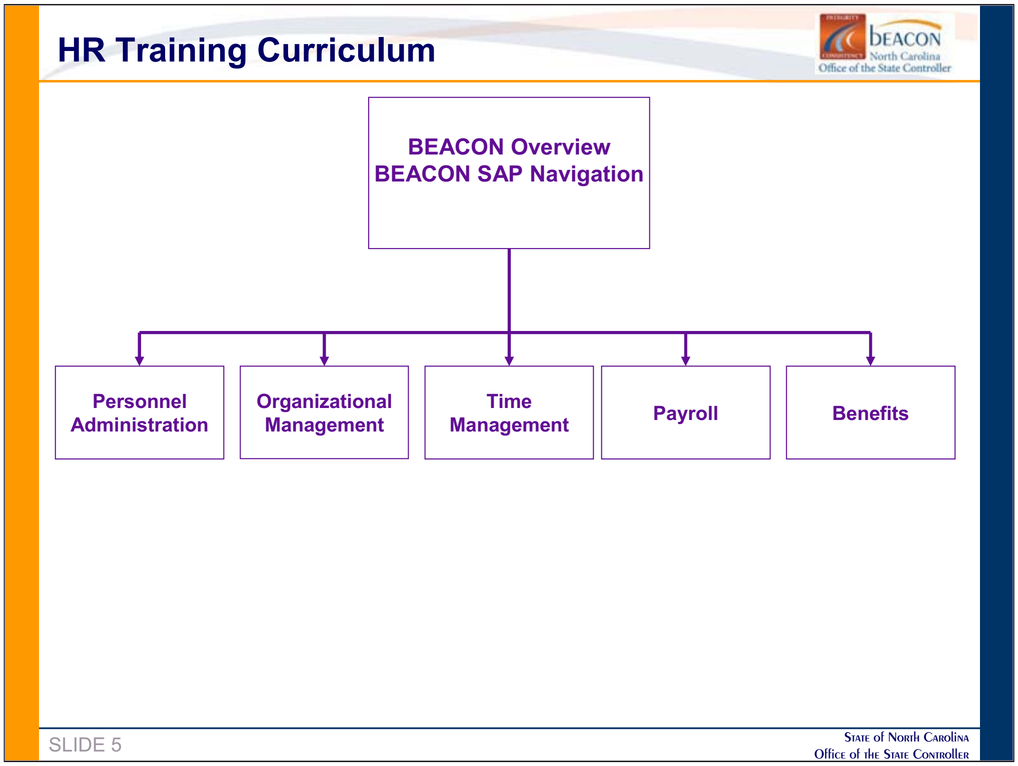
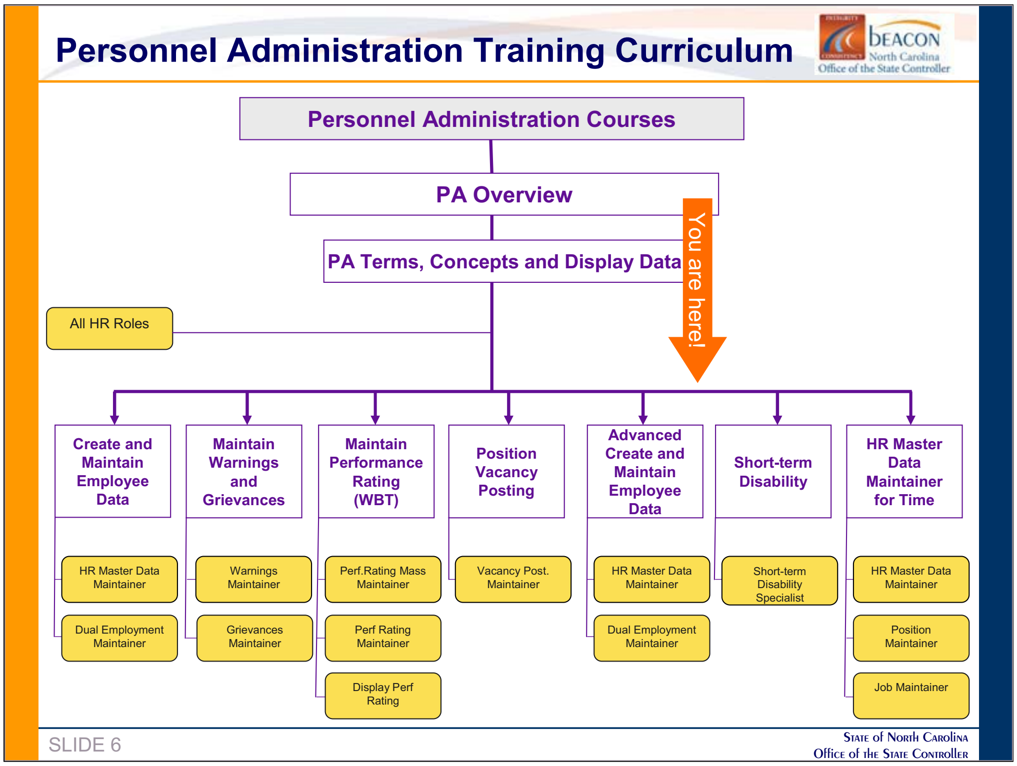
**Notes:**




**Notes:**

The BEACON HR/ Payroll training program comprises several courses and different modules. Based on your HR role you will attend courses in the Personnel Administration module.




**Notes:**

Within the Personnel Administration module, there are several courses.  Everyone attends the first course, Personnel Administration Overview.  Your position determines which additional courses you may be required to attend.

In addition to the above courses, there are several web-based courses available:

- BEACON Overview
- Basic Navigation
- Personnel Administration Overview (PA200)

## Course Results

The following activities and exercises are associated with each lesson:

- Lesson 1: PA310 Review
- Lesson 2: Transfers
  - Hire a former State employee that has no record in BEACON SAP
  - Transfer an employee from a Non-BEACON Agency to a BEACON Agency
  - Transfer an employee from a BEACON Agency to a different BEACON Agency and include a promotion
- Lesson 3: Work Against
  - View simulations
- Lesson 4: LOA
  - Create an action to indicate the employee is out on FMLA leave
  - Create an action to indicate the employee is out on Military leave
  - Create an action to indicate the employee is out on Workers' Comp leave
  - Reinstate an employee from a Workers' Comp leave

*Continued…*

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**Notes:**

## Course Results *(continued)*

- Lesson 5: Career Progression
  - Create a record to indicate an employee has advanced a level
- Lesson 6: Reallocation
  - Facilitated discussion
- Lesson 7: Dual Employment
  - Facilitated discussion
- Lesson 8: Additional Actions
  - Demotion
  - Investigatory w/pay
  - Suspension
  - Cancel Salary Adjustment
- Lesson 9: Review course materials

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**Notes:**

## Course Objectives

Upon completion of this course, you should be able to:

- Define key terms and concepts
- Hire an employee from a non-BEACON Agency
- Transfer an employee within a BEACON Agency or to a different BEACON Agency
- Describe the Work Against rules and processes
- Describe the various reasons for a Leave of Absence and determine when each is applicable to use
- Reinstate an employee from Leave of Absence
- Execute a Career Progression
- Discuss how to process a Reallocation and reserve funds
- Describe Dual Employment
- Have a high level understanding of additional Actions associated with an employee

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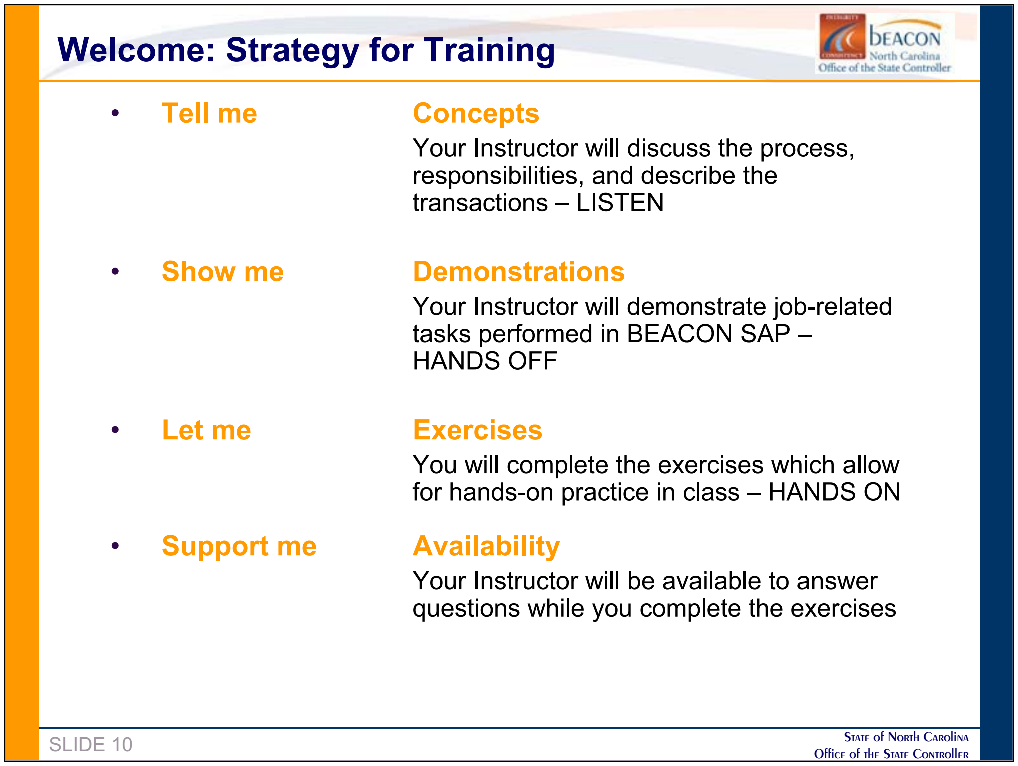
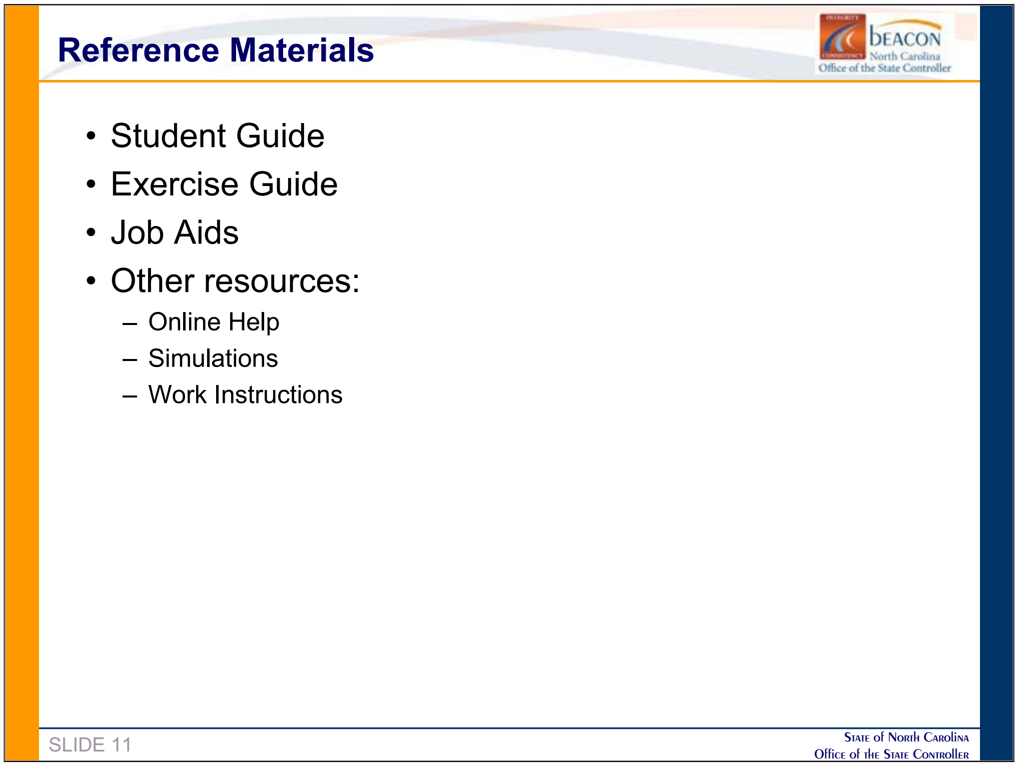
**Notes:**




**Notes:**

The Advanced *Create and Maintain Employee Data* Student's Guide provides a copy of the PowerPoint presentation used in the classroom training.  You will observe that space is available for you to write notes. You can use the guide as a reference when you return to the workplace. For example, you can use the exercises for practicing in the BEACON SAP training environment.

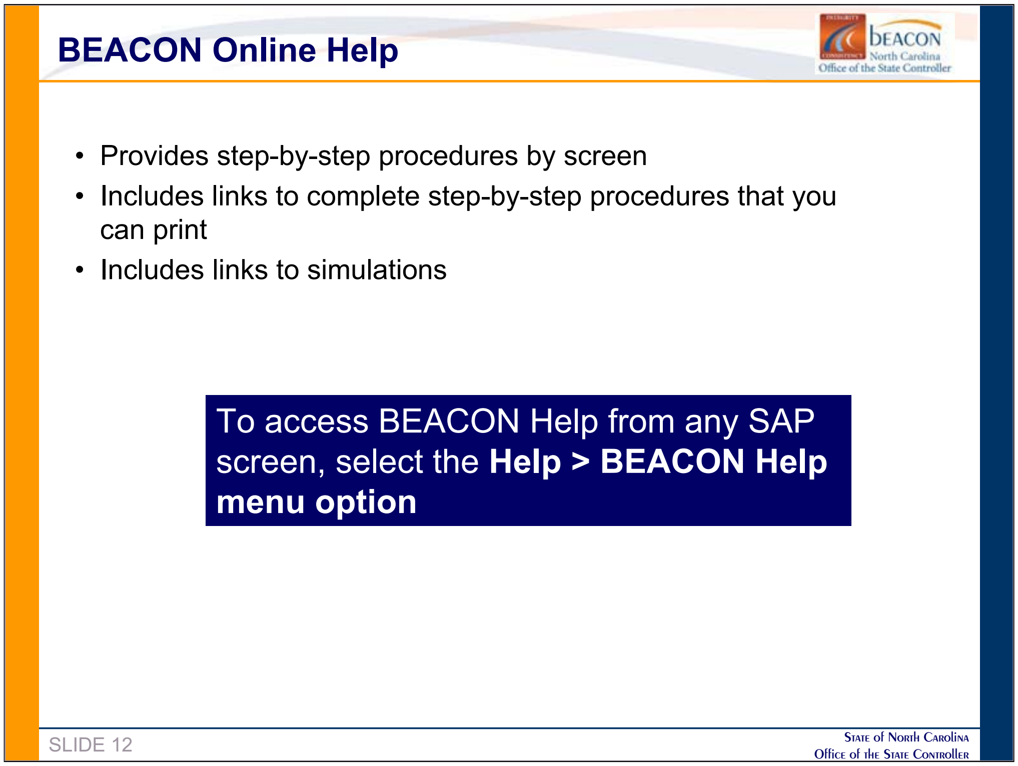
You may also find it useful to take the Employee Self-Service and Manager Self-Service courses, although they are not required for the PA curriculum.  They are, however, mandatory for other requirements.




**Notes:**

Simulations let you practice using SAP in a clearly defined and safe environment. Each simulation has instructions to guide you through the task.

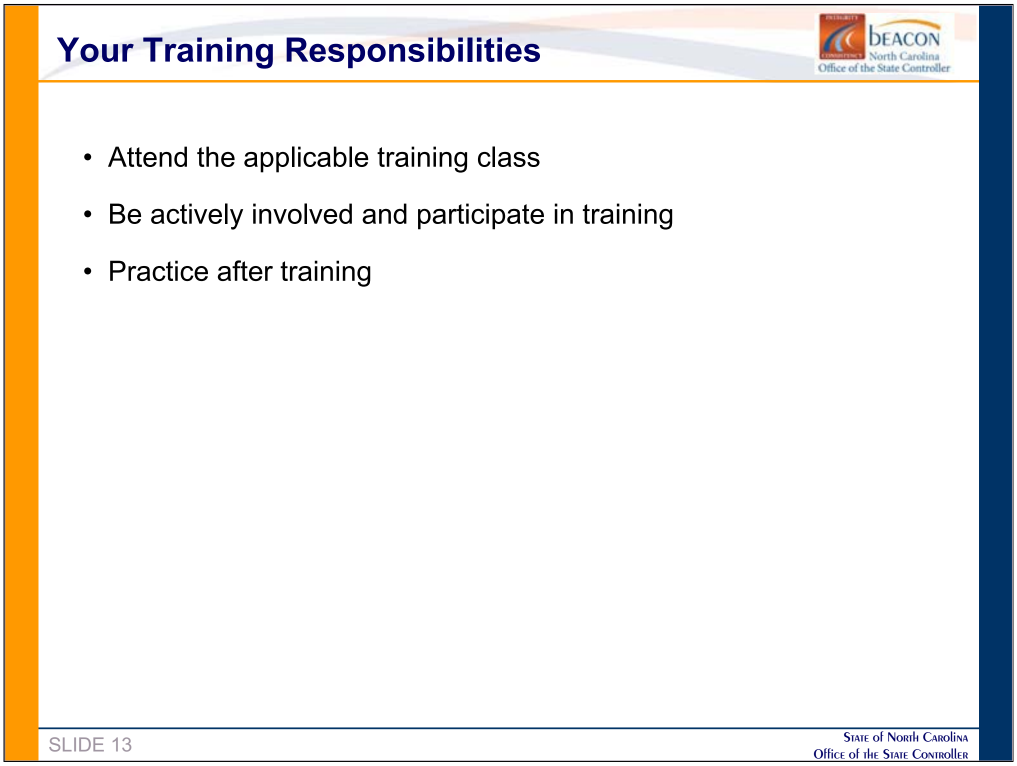
Simulations are available only for select transactions.




**Notes:**

To access BEACON online help:

- http://help.mybeacon.nc.gov/beaconhelp/

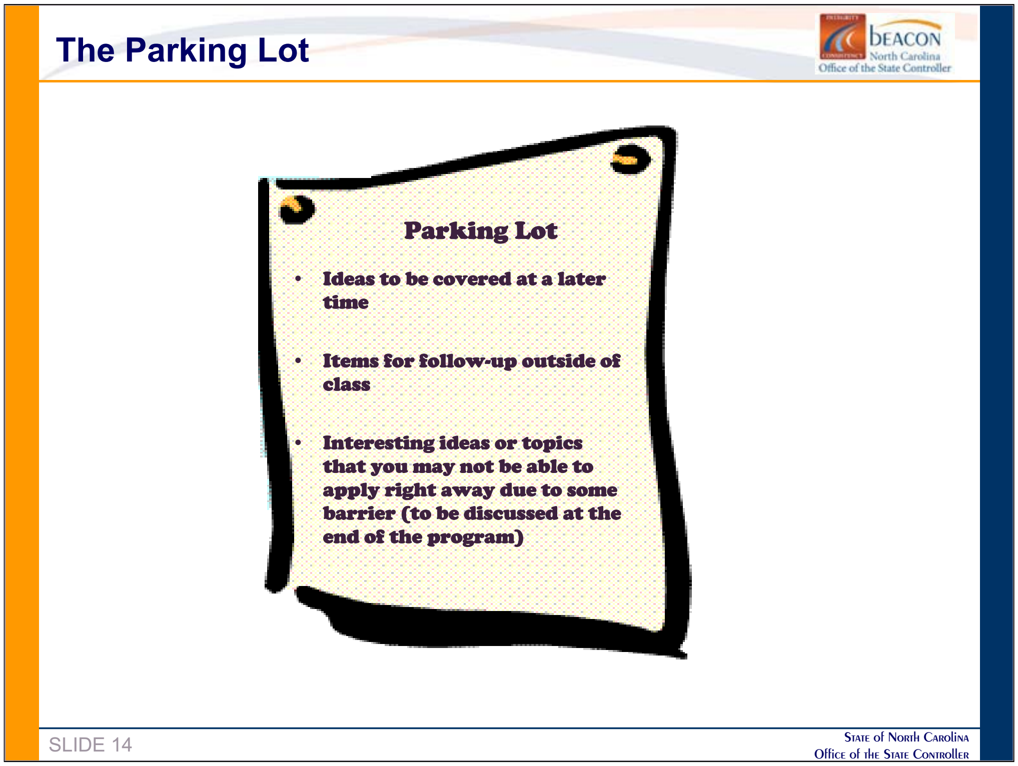



**Notes:**

This course, as is true with all of the HR courses, is not designed for your specific division or agency procedures and policies. The training does not include all of the scenarios you encounter in your current Job role. Instead, the courses in the Personnel Administration curriculum are designed with two purposes in mind:

- To give you the basic knowledge and skills you need in order to perform your tasks in the SAP application as well as to perform any related business processes.
- To demonstrate how you can further develop your skills by using the classroom materials, Work Instructions, Online Help and practice sessions are available to continue your BEACON SAP education after training is completed.

As you can see, you play an active role in your training development. The BEACON SAP HR/Payroll training is designed to ensure that you have the information you need in order to perform your duties and responsibilities.




**Notes:**

The *Parking Lot* will be used to record any concerns, expectations, and questions that cannot be answered during the class. If needed, your instructors will follow up with answers to questions that could not be answered in class.

When you think of a concern, ask the instructor. If the instructor /navigator cannot answer the question, it will be posted to the class Parking Lot. If possible, the instructor will try to obtain the answer from the BEACON support team by the end of the class day.

The instructor will share the answer if it is received before the end of class. If an expectation or concern cannot be addressed in class, the instructor will continue to research it, and provide the class with a response at a later date via email.


Course Map
BEACON
North Carolina
Office of the State Controller
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Lesson 9: Course Review
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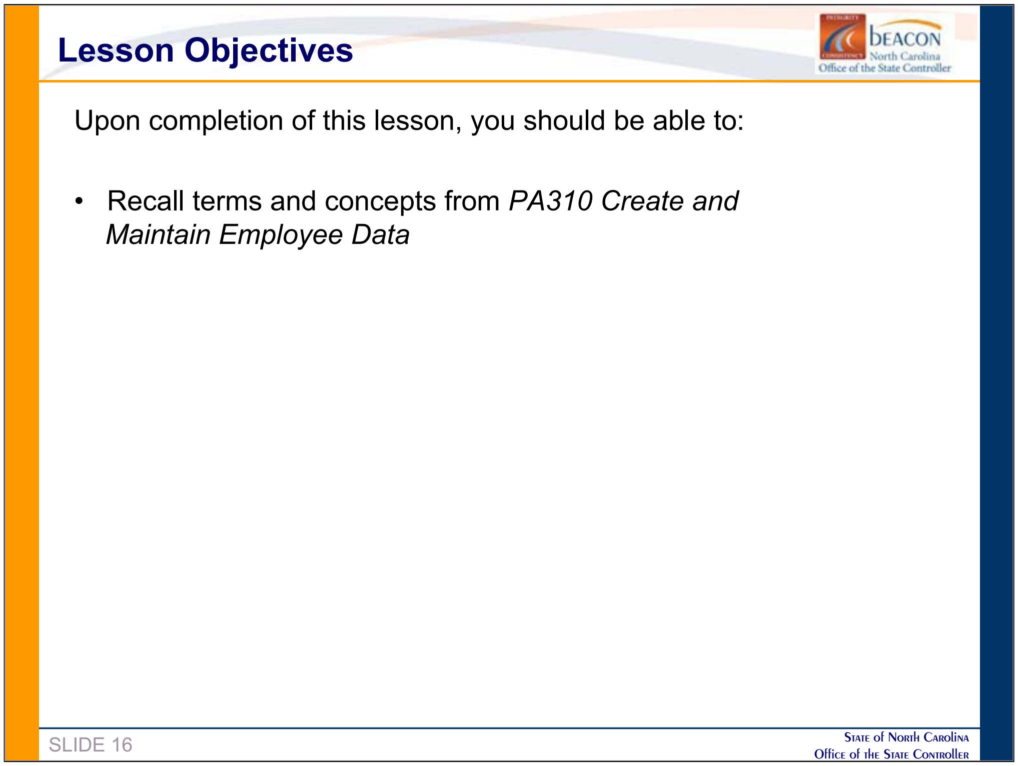
**Notes:**


Lesson Objectives
BEACON
North Carolina
Office of the State Controller
Upon completion of this lesson, you should be able to:
• Recall terms and concepts from *PA310 Create and Maintain Employee Data*
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**Notes:**

## Miscellaneous Tips and Tricks (1 of 4)

- Multiple infotypes on an Action – use PA30
- Date Specifications
  - Enter last day worked on Separations
  - Delete on Reinstatements
  - Review for accuracy on all other Actions
- Case sensitivity – upper and lower

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**Notes:**

Before you get started with your first Action, the following are tips and tricks to provide you with additional information.

### Multiple infotypes for a specific item

When an employee needs more than one infotype (bank details, objects-on-loan, certifications etc.), you should only enter one during the Action. The additional information must be entered using PA30.

### Date Specifications

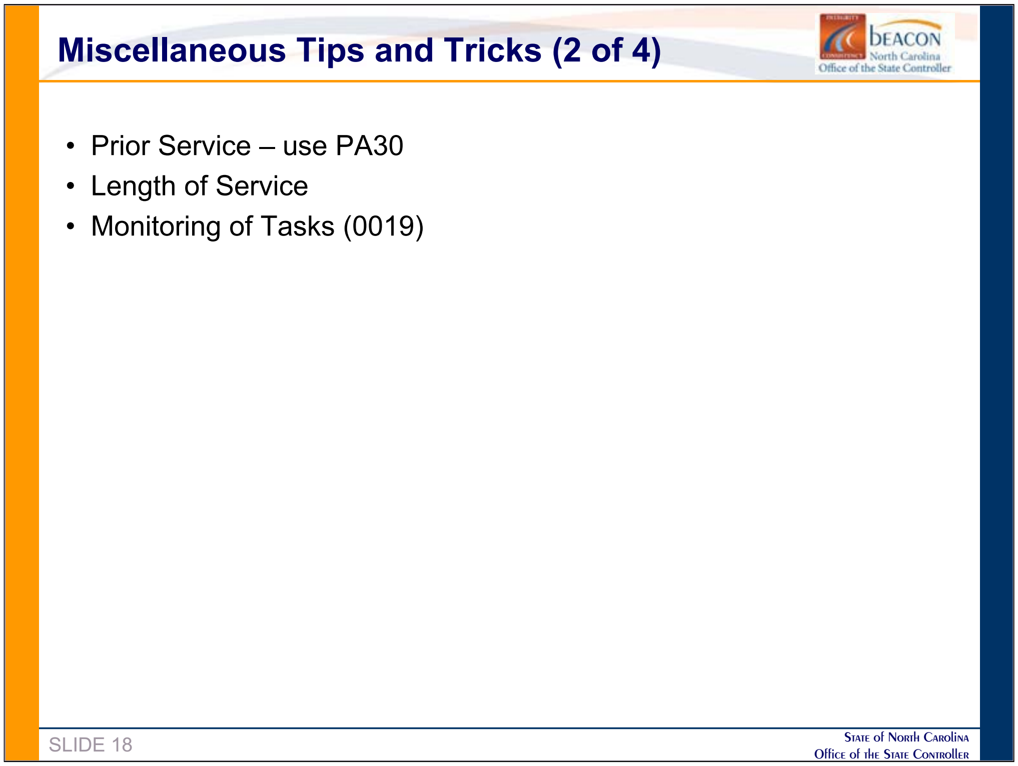
The Date Specifications infotype (0041) is only created for permanent employees and contains the *original hire date*. Supplemental employees will not receive a Date Specifications infotype. The infotype generally pre-populates so you only have to perform the following:

- Agency hire date – it will pre-populate to match the hire date, or reinstatement date. You would adjust the agency date as needed during a Reinstatement if the employee was on leave without pay and did not earn creditable service while on leave.

- Last Day Worked – it should pre-populate when you separate an employee. You will delete the last day worked when you use the Reinstatement Action to reinstate a BEACON employee from previous BEACON employment.

### Case sensitivity

BEACON SAP is case sensitive. The standard for the State uses upper and lower case (sentence format). It is important to maintain this format for consistency in reports and searches. This is true for all entries, including Actions and PA30s.




**Prior service**

Prior service is not entered during the New Hire, Reinstatement or Non-BEACON to BEACON Action. After you verify that the employee is entitled to prior service, you must access PA30 and enter the number of months of prior service on infotype **Time Specification/Employ. Period (0552)**. This infotype calculates the number of months of prior service based on the dates you entered. If the number of months don't calculate correctly, you may have to adjust the dates accordingly just as you did in PMIS (this rarely happens). If you do have to adjust the dates, you should enter the correct work dates in the comments field. This infotype contains only the services from PMIS and prior to PMIS. You may have to enter more than one PA30 if the employee has prior service at more than one Agency.

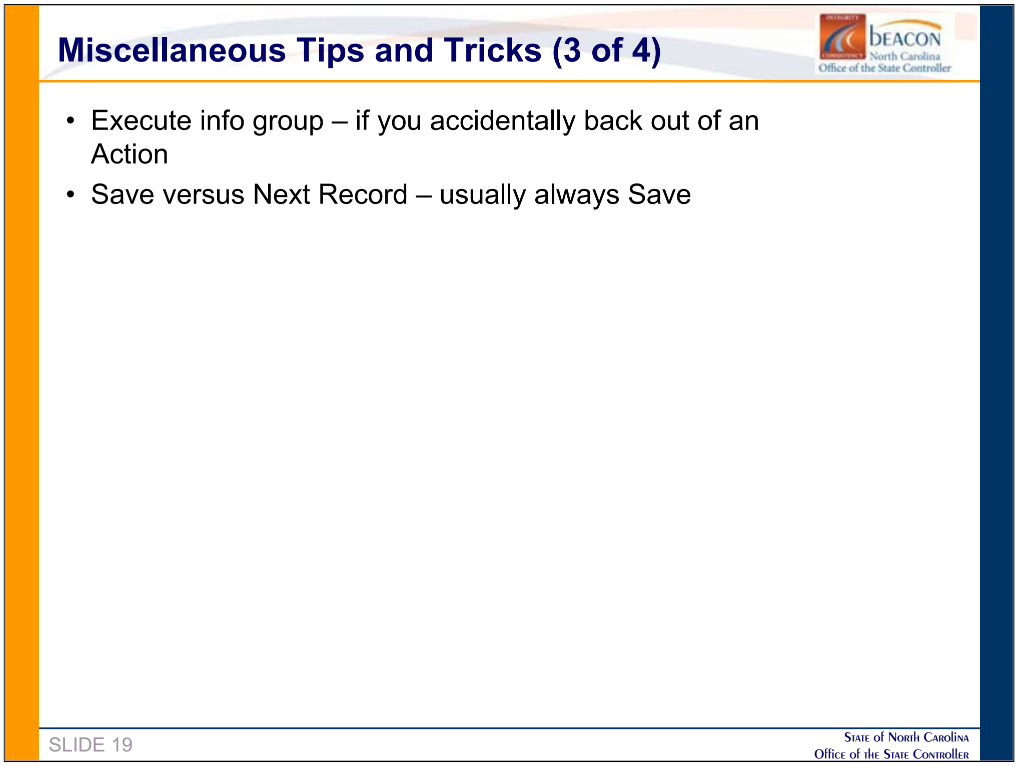
**Length of Service**

If you have the "Display Time" role, you can use PT_BAL00 to view the latest number of months of service. See the online job aid *Length of Service*, for details on accessing the transaction.

**Monitoring of Tasks**

This infotype is like a tickler file and is date driven. After you enter the due date, it reminds you to follow up on a particular infotype, like education or probation. In order to view the various tasks you have due within a week, run the Date Monitoring report. If you complete the task prior to the due date you entered, the task will still appear on the Date Monitoring report and in the Manager Self-Service, unless you delimit the Monitoring of Tasks infotype.

**Notes:**




**Execute info group button**

On occasion when you are entering data in an Action, you may inadvertently click the Back button and the system takes you back to the Personnel Action screen. From the Personnel Actions screen, select the same Action and date. Click Execute. On the next screen, select Execute info group. A warning message displays indicating that the personnel action is not saved. Click Continue and click the Next Record button. Page forward until you get to the infotype you were working on before you accidentally exited (you may have to re-enter data on some of the infotypes that you had already populated). After you reach the infotype you are looking for, continue entering data until the Action is complete.

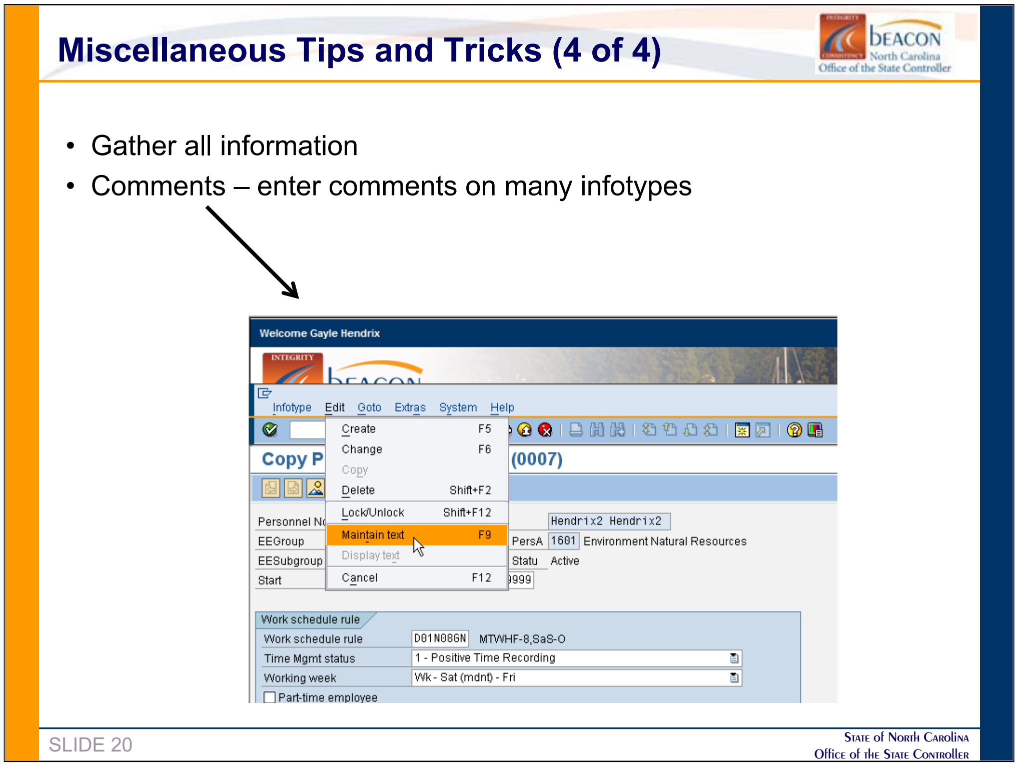
**Save versus Next Record**

**NOTE**: Even if no changes are being made to an infotype, you should still save the infotype because it may be connected to dynamic infotypes which will not display if you have not saved the appropriate infotypes.

A best practice is to use the Next record button to move to the next infotype when the infotype is blank and has required fields that you do not need to populate. For example, if you do not need to enter data on the Monitoring of Tasks (0019) infotype, use the Next Record button instead of Save. In that case, if you use Save instead of Next Record, you will receive an error message and must click Next Record to continue.

Generally, save infotypes that are pre-populated, even if you do not make any changes. Use Next Record on blank infotypes.

**Notes:**

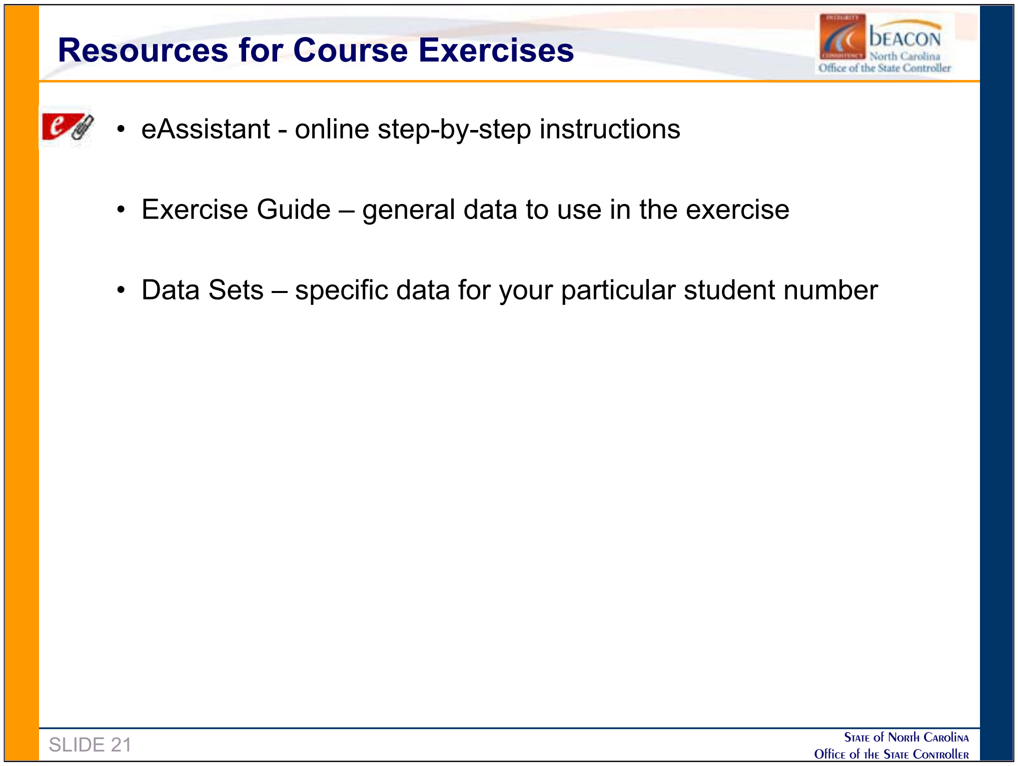



**Notes:**

**Gather all data before initiating Action**
You should ensure that you have all of the employee's information before you initiate an Action. The general rule is "wait until you can finish before you start the Action in BEACON". However, there are occasions, like a New Hire, when you do not have the information (bank details, tax, etc.). In that case, after you get the approval via Workflow for the new employee, let the PCR stay in your inbox until the employee arrives before you initiate the Action. If the employee is a no-show, you only have to cancel the PCR since you have not initiated the Action. When you do initiate the Action, if you still do not have the bank and tax information, you would set the Bank Details (0009) infotype to check, and the Tax Withholding (0210) infotype to single, zero allowances.

**Comments function**
The Comments function is useful as you are entering data (whether via an Action or a PA30). You can enter comments on many infotypes by selecting **Edit > Maintain** text from the menu. A new window displays where you can enter comments. The standard for comments is to preface your remarks by **your name and the date**. Keep in mind the remarks must be professional. You cannot report from the comments.

The online job aid *Maintain Text for Infotypes* contains a complete list of the infotypes to which comments can be added. However, the comments that you write on a Workflow (using the Service for Objects button) do not transfer to the comments section of an infotype. You can cut and paste Workflow comments into the applicable infotype.

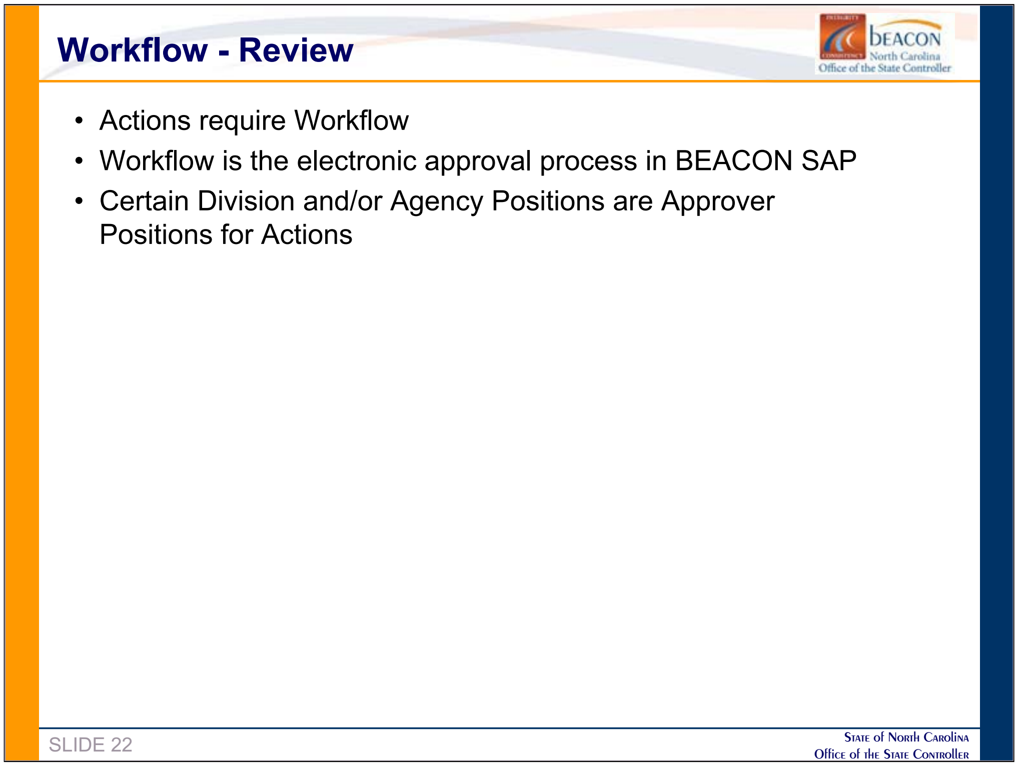



## Notes:

**eAssistant**
You can access the eAssistant from any BEACON SAP screen by clicking **Help** on the menu bar, and then selecting **BEACONHelp**. A new window is displayed on top of the BEACON SAP screen with the steps for the transaction. You can drag the sides of the eAssistant screen to make it larger or smaller. You can also link to a .pdf copy of the instructions *Caution!* **Do not** try to enter the sample values from the examples in the step by step procedures.

***Exercise Guides***
The Exercise Guide for each hands-on exercise contains the scenario and general data that you will enter in various fields. The Data Guide does not contain instructions about how to perform the transaction; it only contains data.

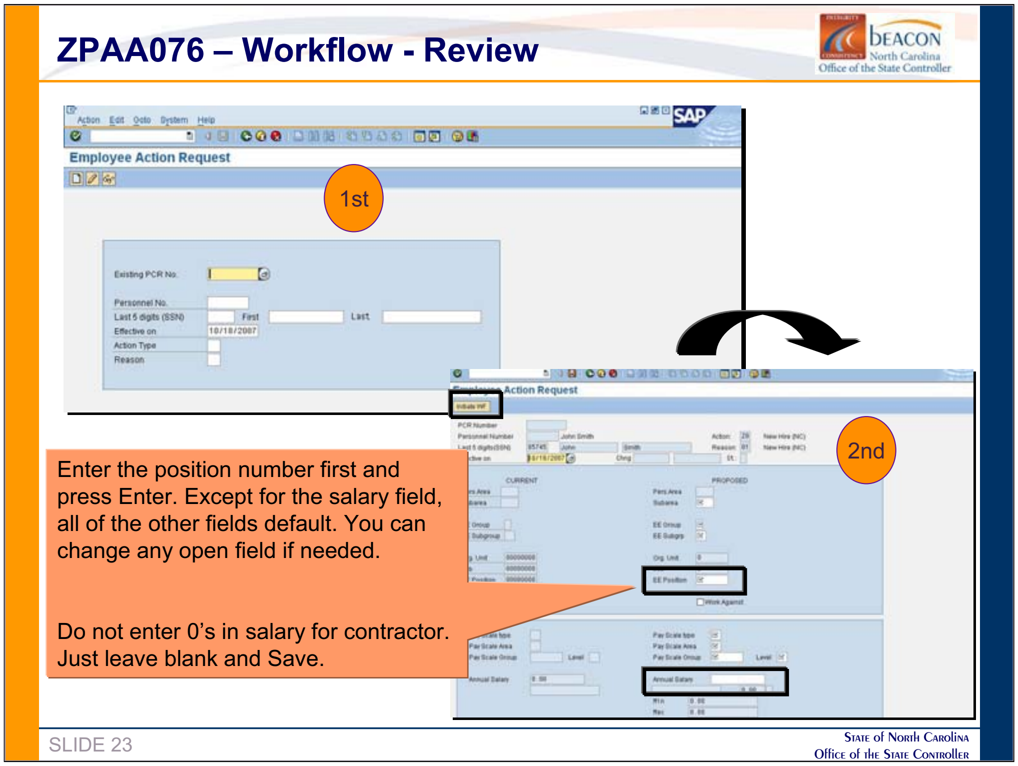
***Data Sets***
You will be given a Data Set that contains specific data assigned to your computer number. **Use only the data assigned to you.**




**Notes:**

All PA Actions need approval before the Action can be executed. The BEACON SAP Workflow enables approvals (or rejections) to be obtained electronically. In your Agency, you may already have a manual process in place. Workflow does not eliminate that process entirely, however, it may duplicate a portion of your manual process. You still have to provide the same type of documentation to the Approver that you have always provided—that has not changed. However, in BEACON SAP, you can attach documents to the Workflow as well as write notes using the Services for Objects button.

The authority to approve an Action is associated with the Position, and not to the person and person's role. If a person leaves an approver Position the authority to approve stays with the Position. A person who is subsequently assigned to that Position, also assumes the approval authority (unless the Position is changed by Security).




**Notes:**

You will use Transaction code **ZPAA076** to *initiate* the BEACON SAP electronic approval process, referred to as Workflow (WF).

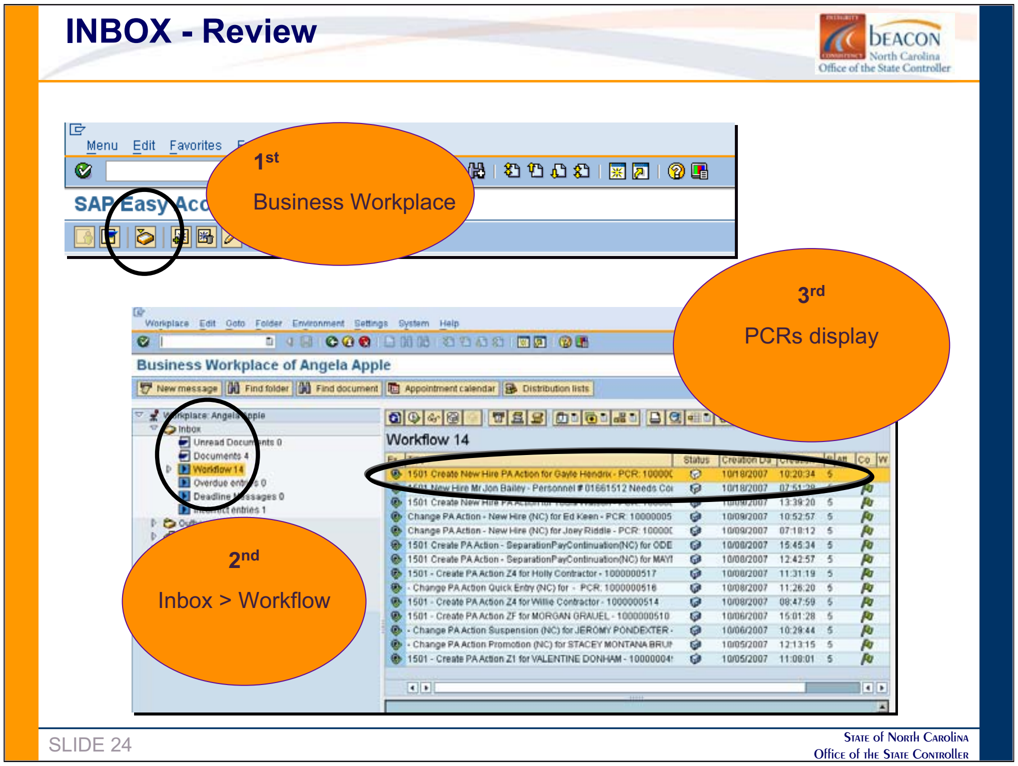
On the initial *Employee Action Request* screen you will enter the applicable data. After you select or enter the Action type and Reason, the second *Employee Action Request* screen is displayed. This screen has two columns. On the left you can view the current status of the employee. On the right, you enter the new data pertinent to the Action you are processing.

When you save and initiate Workflow you will receive a Personnel Change Request (PCR) number. Be sure to make a record of the PCR number so that you can track it for future use.

When the WF involves making a change to the employee's position, a best practice is to enter the position number first, and then press Enter. When you press Enter, the other fields, except salary, default from the position.

If the WF does not change the employee's salary, you must enter his or her current salary in the salary field. If the WF is for a contractor, leave the salary field blank, do not enter zeroes.

After you complete the data entry and click Initiate WF, BEACON SAP sends the request to the appropriate Approver. There may be more than one level of approval in the process. Any Approver that is part of the process can approve or reject the request.



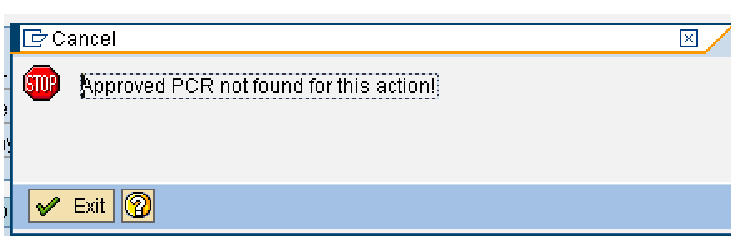

## Notes:

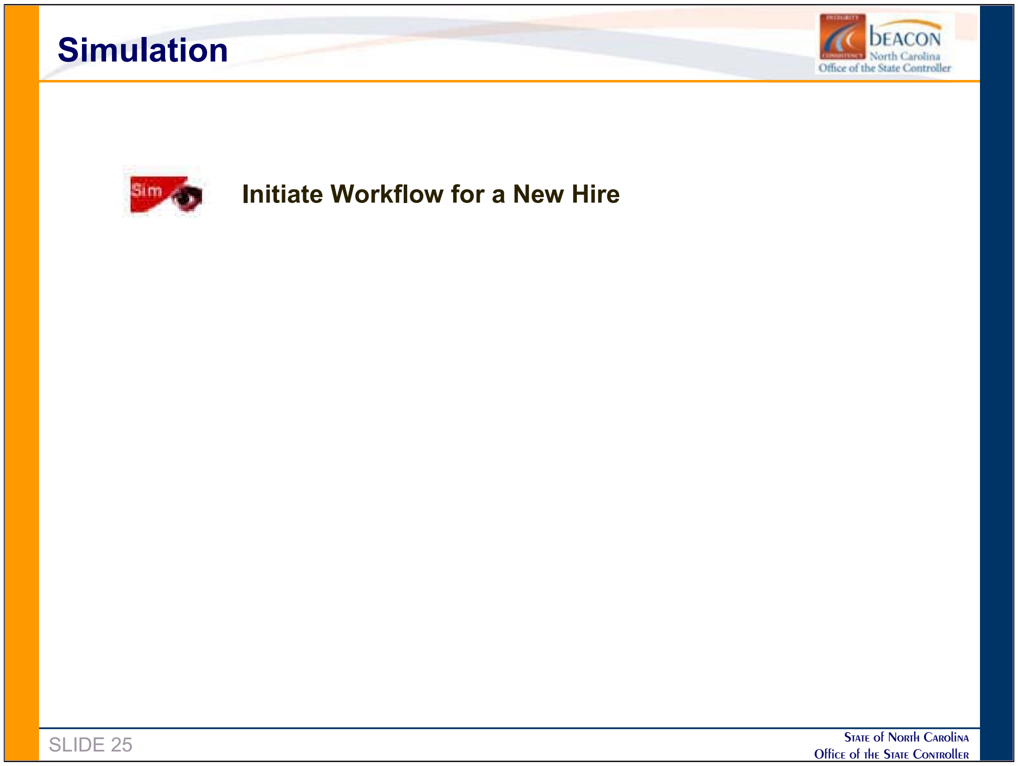
The second part of the Workflow is to process your Workflow item when it has been approved (or to see if it was rejected). Go into the SAP Business Workplace from the Easy Access screen.

From the Business Workplace screen, click **Inbox** > **Workflow**. All of the PCRs that you have initiated and which have either been approved or rejected are listed on the right. Double-click the approved PCR and the applicable screen automatically is displayed for the Action (Personnel Actions screen or the Hiring Screen as appropriate). You will then execute the appropriate Action.

During training you will not initiate a Workflow for the Actions you create, you will use ZHR_Hiring and PA40. Therefore, in training, you will have to enter data in some of the fields that normally would be pre-populated in your work environment. Just keep in mind that in your work environment Workflow will always be the first step before you initiate an Action.

After you have an approved PCR and you are ready to execute the Action for the employee, you must be sure to enter the same date on the Personnel Actions screen as you entered on the Workflow. If you enter a different date on the Personnel Actions screen, you will receive a message that the approved PCR is not found. You will also receive this message if you attempt to bypass ZPAA076.






**Notes:**

There are two aspects of Workflow that you will be involved in as the Initiator of an Action:

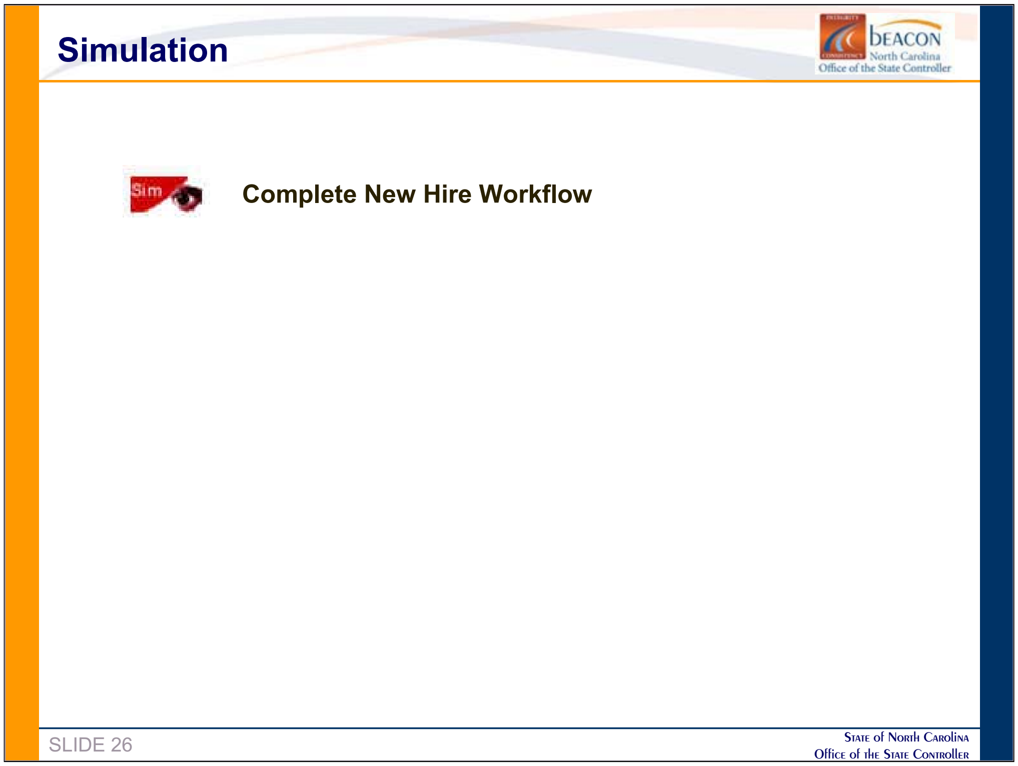
- Initiate Workflow
- Complete the approved Personnel Change Request (PCR)

If you are also an approver for PCRs that is obviously a third aspect. In this course, you will be given information about initiating and executing Workflow.

Additional training on the entire Workflow process is available in OM220.

Keep in mind that in this course you will not access the Actions via Workflow. However, the simulation will give you an idea of how it works.

The first simulation demonstrates how to initiate Workflow. Although the simulation is for a new hire, the process is similar for all other actions.




**Notes:**

After you have initiated the Action via Workflow your PCR is then sent through the approval process, which may involve more than one approver.

You should check your SAP inbox later in the day, or the next day, to see if the PCR you submitted has been approved.

This next simulation begins at the stage of the process where the HR Master Data Maintainer is checking to see if the PCR has been approved. In this scenario, the PCR has been approved. The simulation then takes you through the steps to execute the PCR up to the Hiring screen.

## Lesson Objectives

BEACON North Carolina Office of the State Controller

In this lesson, you learned to:

- Recall terms and concepts from *PA310 Create and Maintain Employee Data*.

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Office of the State Controller

**Notes:**

## Course Map

BEACON North Carolina Office of the State Controller

- Lesson 1: PA310 Review
- **Lesson 2: Transfers**
- Lesson 3: Work Against
- Lesson 4: Leave of Absence
- Lesson 5: Career Progression
- Lesson 6: Reallocation
- Lesson 7: Dual Employment
- Lesson 8: Additional Actions
- Lesson 9: Course Review

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## Notes:

## Lesson Objectives

Upon completion of this lesson, you should be able to describe and enter the applicable data to:

- Transfer an employee from a non-BEACON Agency to a BEACON Agency
- Transfer an employee from one BEACON Agency to a different BEACON Agency

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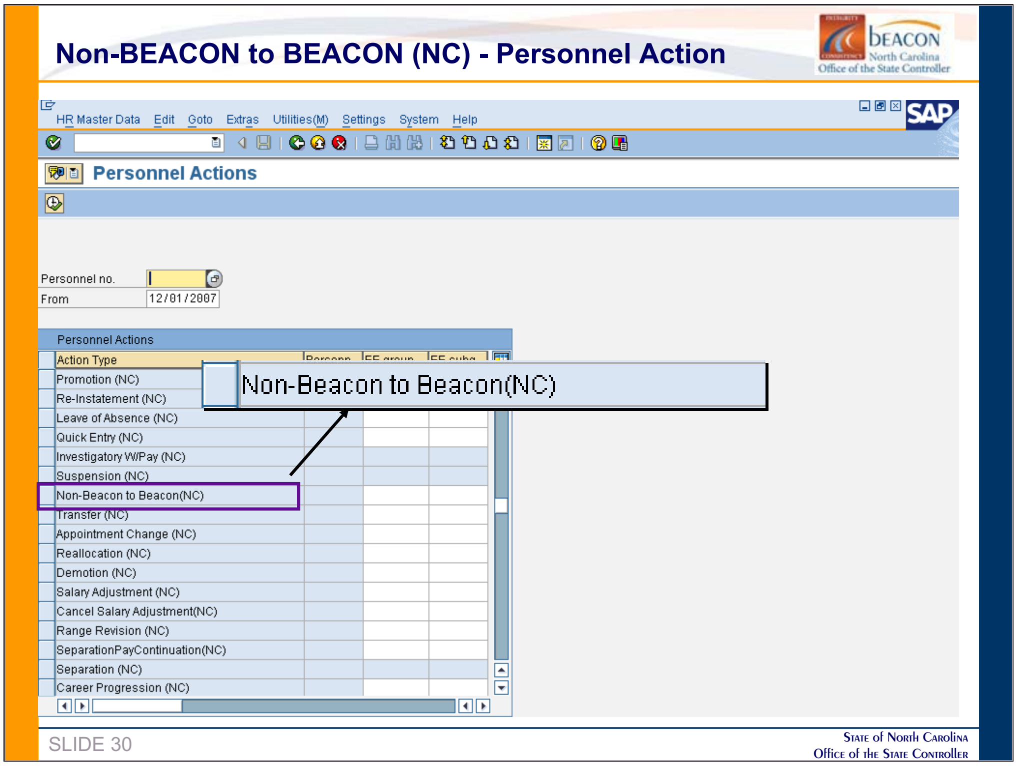
**Notes:**



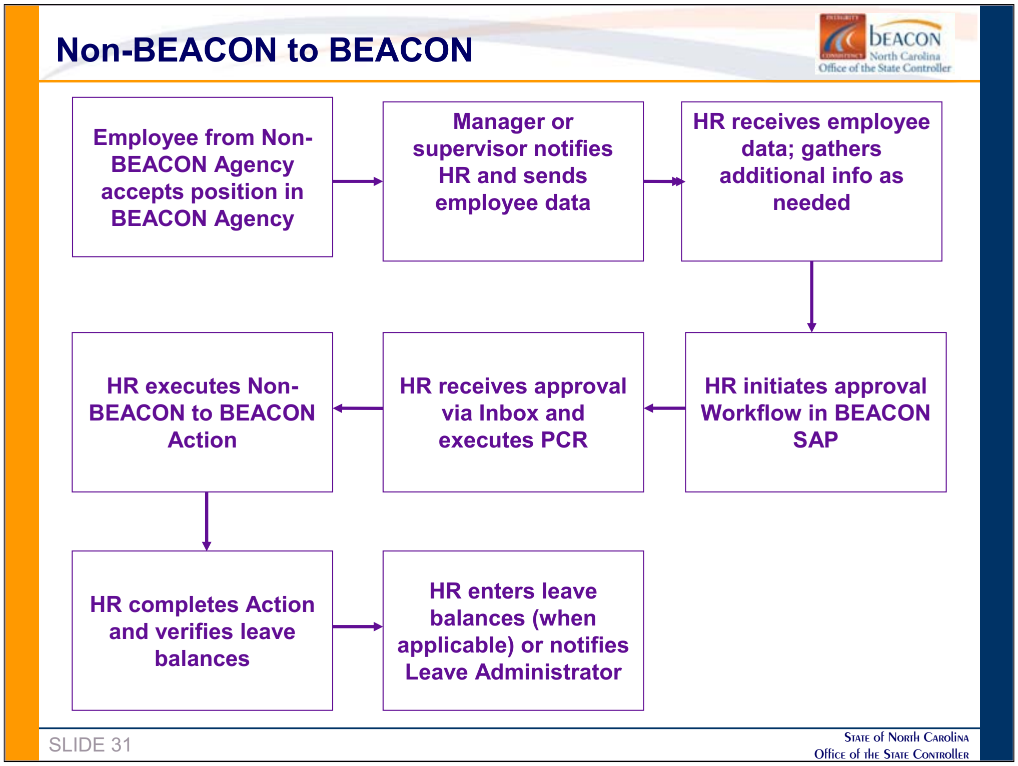

## Notes:

The Non-BEACON to BEACON Action is used when:

- The returning employee has a record in PMIS, but does not have a record in BEACON because he or she left State employment before his or her Agency converted to BEACON. The employee may be returning to the same agency as the one he or she left (as well as to the same position), or may be going to a new agency and position. As long as the former employee has a record in PMIS, but does not have a record in BEACON, you will use the Non-BEACON to BEACON Action. You would not use Reinstatement in this case because Reinstatement is only used to reinstate an employee from BEACON to BEACON.
- A University employee is leaving the university system and accepting a position with a State Agency.

**Reasons associated with the Non-BEACON to BEACON Action**

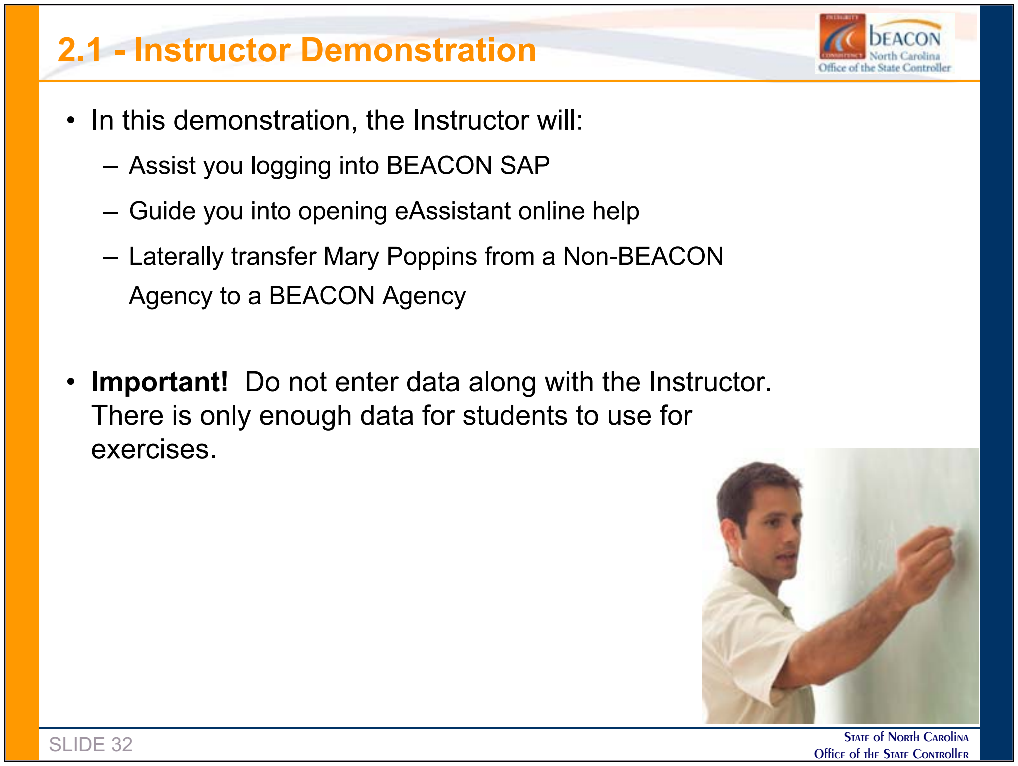
- Transfer Lateral
- Transfer Reassignment
- Transfer Promotion
- Return to State w/in 5 yrs
- Grade-Band Transfer
- Return to St w/in 12 mths same S/G
- Return to St w/in 12 mths higher S/G
- Return to St w/in 12 mths lower S/G
- Return to State after 5 yrs




**Notes:**

As you enter the information for the employee, you will observe that the same infotypes display for the Non-BEACON to BEACON Action as display for a new hire. This is logical since there is no employee record in the agency's BEACON HR system—all of the employee's information is in his or her agency's current non-BEACON system. Therefore, you are creating a completely new HR file, including all of the applicable infotypes, in BEACON SAP (which includes enrolling the employee into the Retirement System).

You should make sure that you obtain any leave balances that are active on the employee. You will verify the balances from the previous agency. If you have a dual role as both the HR Master Data Maintainer and the Leave Administrator, you will need to perform additional steps to add those balances to the employee's BEACON HR SAP records. If your role only consists of being the HR Master Data Maintainer, you must contact the Leave Administrator to ensure that the employee's leave balances are brought up to date.




**Notes:**

**Changing temporary employees to a permanent employee**

If a temporary employee accepts a permanent position, one of the following is applicable:

1. If they change position numbers it is either a Transfer or a Promotion.
2. If they don't change position numbers it is an Appointment Change. You will also modify the salary as applicable in the Appointment Change Action. Be sure to justify salary in Maintain Text.

**Logging into BEACON**

The Instructor will access BEACON SAP and then assist you in logging on and accessing eAssistant. After all of the students have logged on, watch the Instructor complete the Action. The Instructor will demonstrate using the student's scenario. Review the steps on eAssistant as the Instructor demonstrates the process.

It is important that you only enter data when instructed and only use data assigned to you; otherwise, you may be using data that has been designated for other students. This will prevent other students from being able to complete their exercises.

## 2.2 - Exercise

- Non-BEACON to BEACON - Lateral

Mary Poppins, an Administrative Assistant at UNC-CH, has accepted an Administrative Assistant position at OSC-BEACON at a salary of $34k, which is the same as her current salary. She is a permanent, subject to FLSA OT employee. She has 10 years of creditable service.

Note: If you transfer an employee from one employee type to a different employee type, you must change the Employee Subgroup.

Assume you have already submitted Workflow, have received the approval via Inbox, and have executed the PCR.

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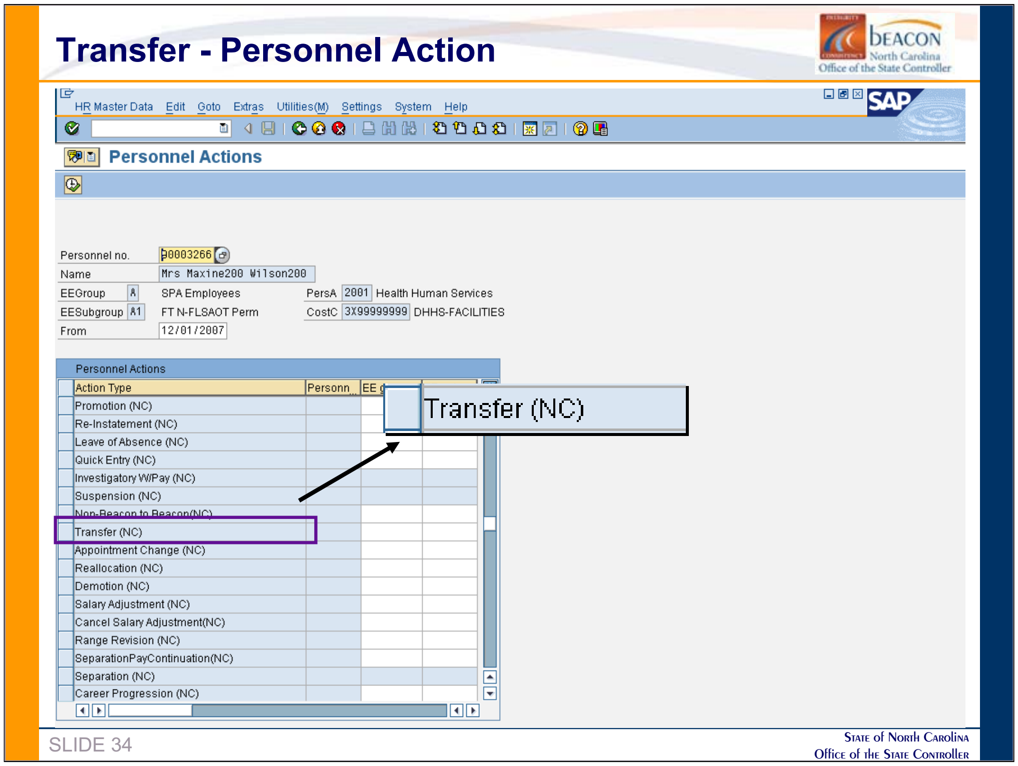
Use the data assigned in the Data Guide to complete the exercise.
Use eAssistant for step-by-step instructions.

**Notes:**

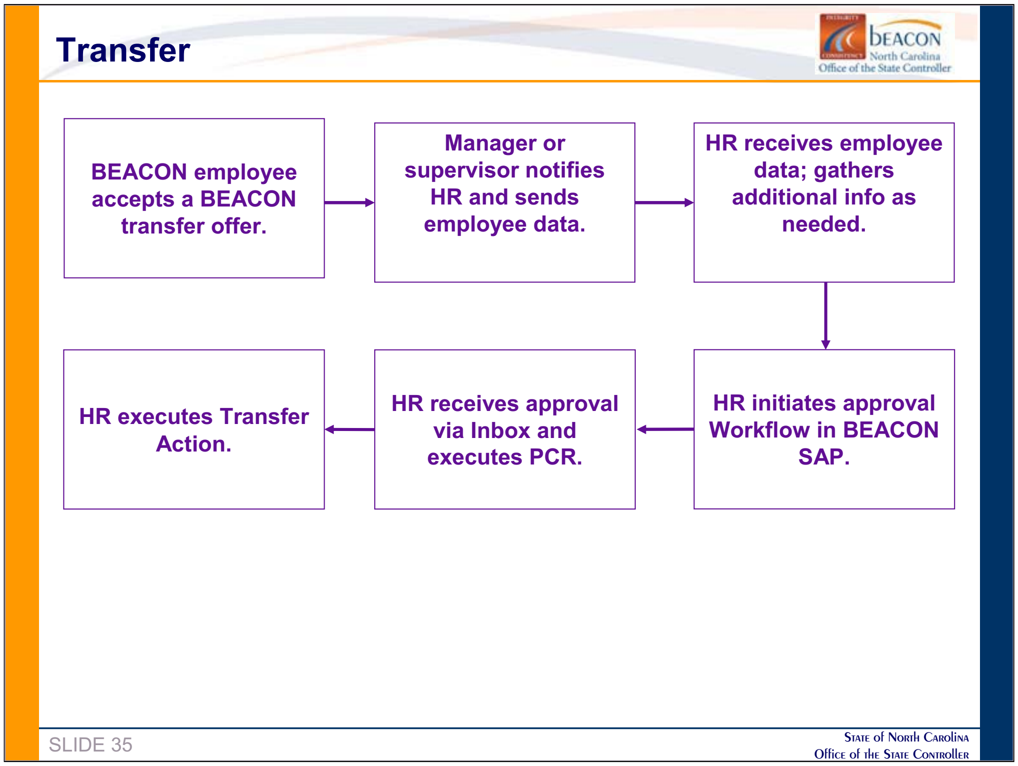



**Notes:**

If your security access permits, you can see some of the information concerning employees in other agencies. Run the *Cross Verification* report to view the employee's personnel record.

**Reasons associated with the Transfer Action**

- Agency to Agency – Lateral
- Agency to Agency – Promotion
- Agency to Agency – Reassignment
- Within Agency – Lateral
- Within Agency – Reassignment
- Grade-Band Transfer




**Notes:**

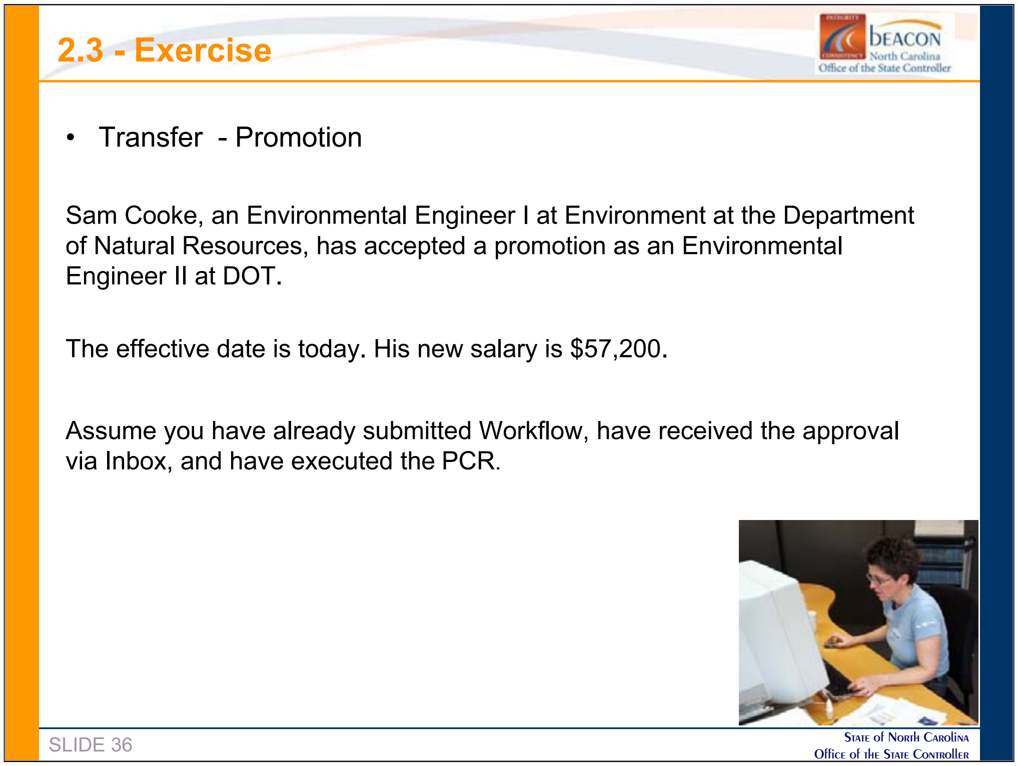
A Transfer Action is used to move an employee from one position to another within the present BEACON agency or between BEACON agencies without a break in service. The transfer may be lateral. However a promotion, demotion, or reassignment may occur simultaneously with the transfer, as you can see from the list of transfer reasons on the previous page.

Normally a transfer between agencies results in an employee reporting to work in the receiving agency the first workday following the separation date from the releasing agency. The releasing agency does not separate the employee in BEACON; however, the releasing agency should delimit any items on loan that the employee returned. If the releasing agency does not delimit the items on loan, the receiving agency can delimit them at the time of transfer (assuming the employee actually returned the items).

When you are processing a Transfer, the Retirement infotype will display. Unless the employee is assigned to a position that entitles him or her to a different retirement program, you do not need to enroll the employee, since the record will transfer from the releasing agency.

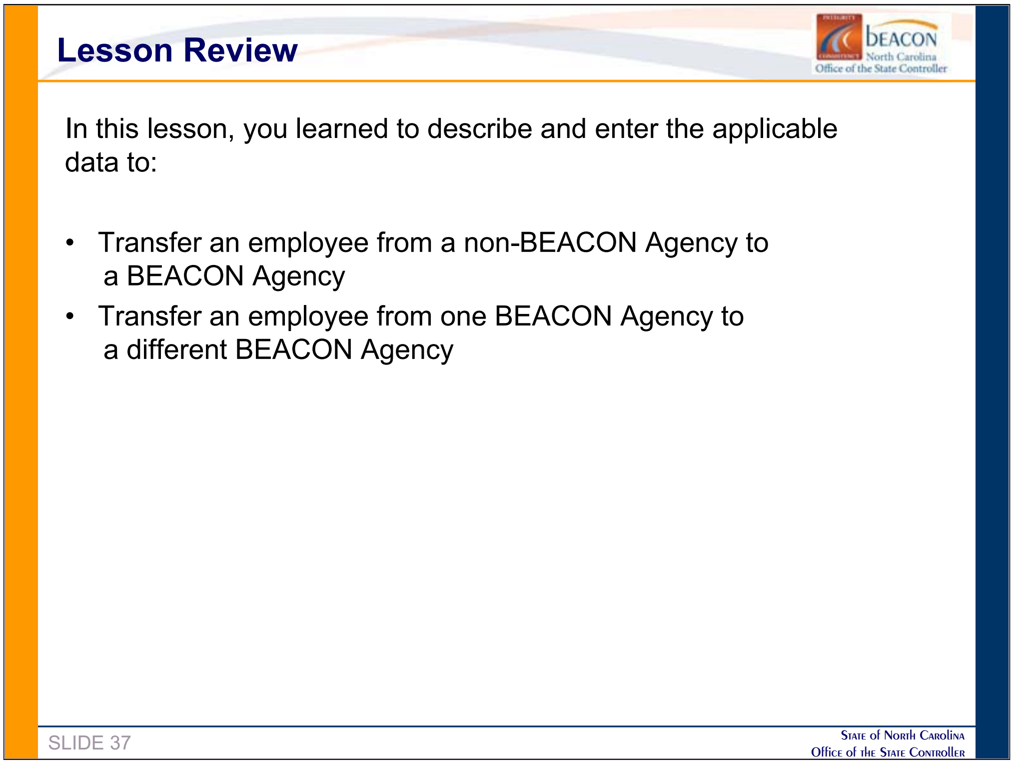
Prior to processing a BEACON to BEACON Transfer, you should review the BI report, *Cross Agency Verification Report B0157* to verify employee information.

Also, make sure that the employee has entered all time, released it, and it has been approved and that the overnight Time Evaluation has run.




Use the data assigned in the Data Guide to complete the exercise.
Use eAssistant for step-by-step instructions.

**Notes:**


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson, you learned to describe and enter the applicable data to:
• Transfer an employee from a non-BEACON Agency to a BEACON Agency
• Transfer an employee from one BEACON Agency to a different BEACON Agency
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Office of the State Controller

**Notes:**

## Course Map

BEACON North Carolina Office of the State Controller

- Lesson 1: PA310 Review
- Lesson 2: Transfers
- **Lesson 3: Work Against**
- Lesson 4: Leave of Absence
- Lesson 5: Career Progression
- Lesson 6: Reallocation
- Lesson 7: Dual Employment
- Lesson 8: Additional Actions
- Lesson 9: Course Review

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**Notes:**

## Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe the Work Against rules and processes
- Identify when it is appropriate to use Work Against
- Describe why a trainee is no longer a Work Against
- Identify the applicable Work Against Actions

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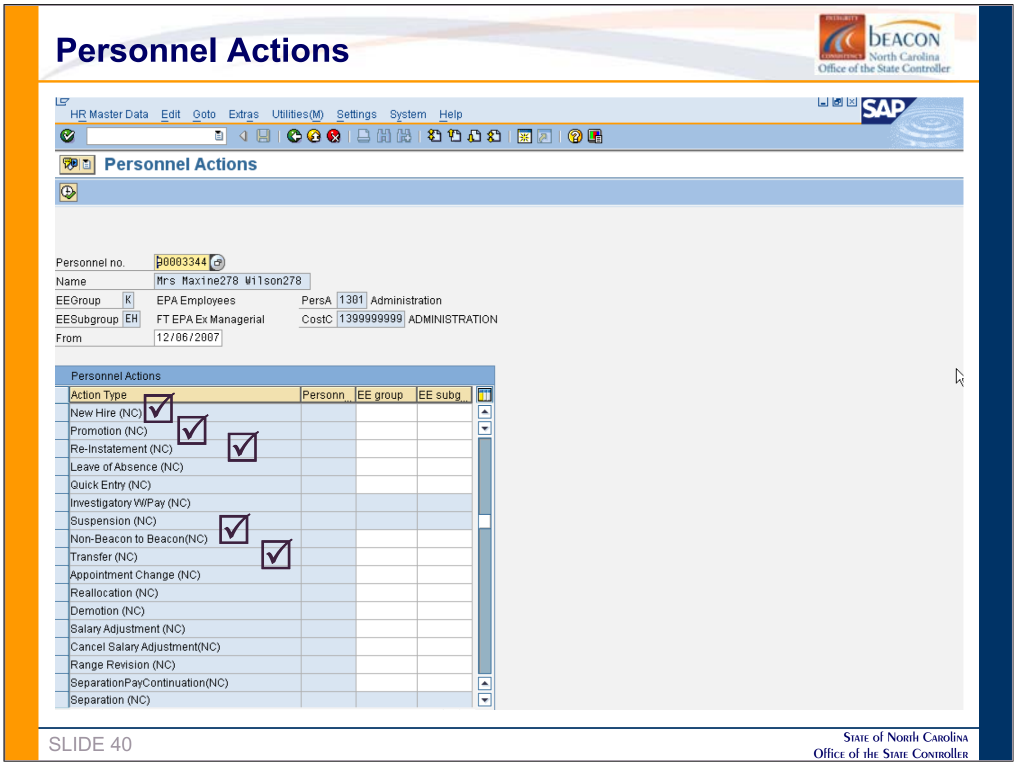
State of North Carolina
Office of the State Controller

**Notes:**



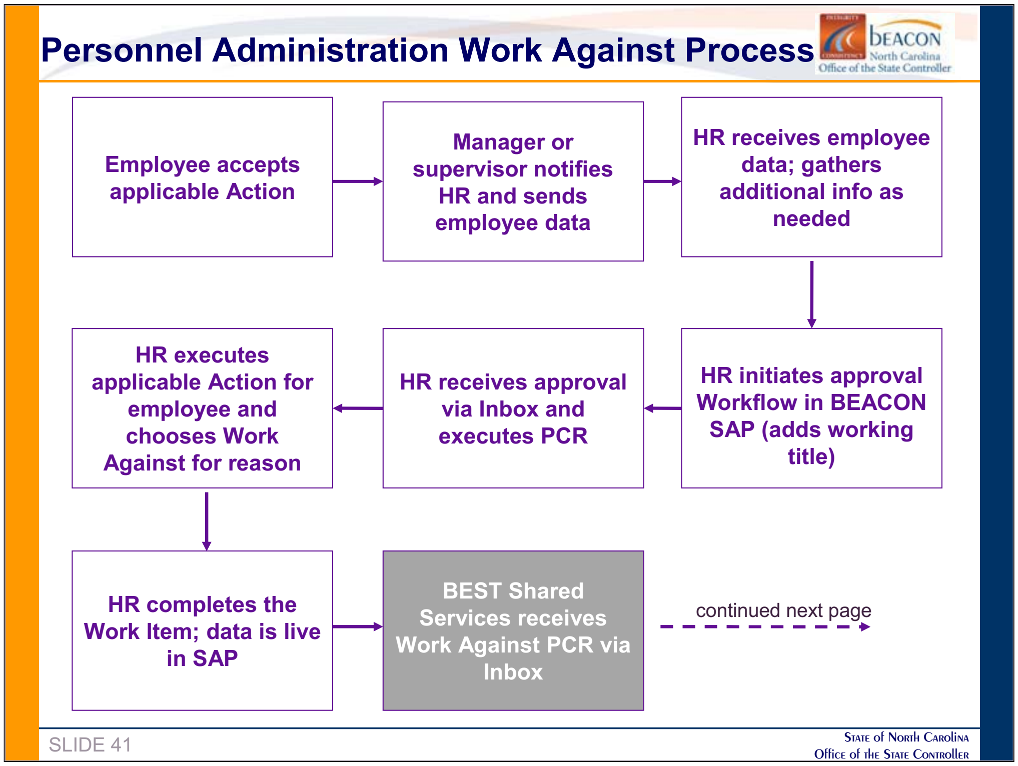

**Notes:**

A **Work Against** can be used during many of the Personnel Administration Actions, including New Hire, Promotion, Reinstatement, Non-BEACON to BEACON, and Transfer. A Work Against may be used when one of the following situations occurs:

- One employee working against a position. The employee and the position must report to the same supervisor.
- Two or more employees working against a position with the total not to exceed one full-time equivalent position. The salary, appointment type and work schedule of the employees may be different from each other. However, the classification, supervisor and all other attributes must be the same for all employees working against the position.

**The rules for Work Against are available in the *Thom Wright Work Against* memo.**

The rules for BEACON Work Against are explained in the above mentioned memo. In the past there have been vast differences in the understanding and application of Work Against. You should review the BEACON rules in depth to ensure that your agency consistently follows the guidelines. You may access the *Thom Wright Work Against* memo online at BEACON University, under HR, PA, Job Aids .



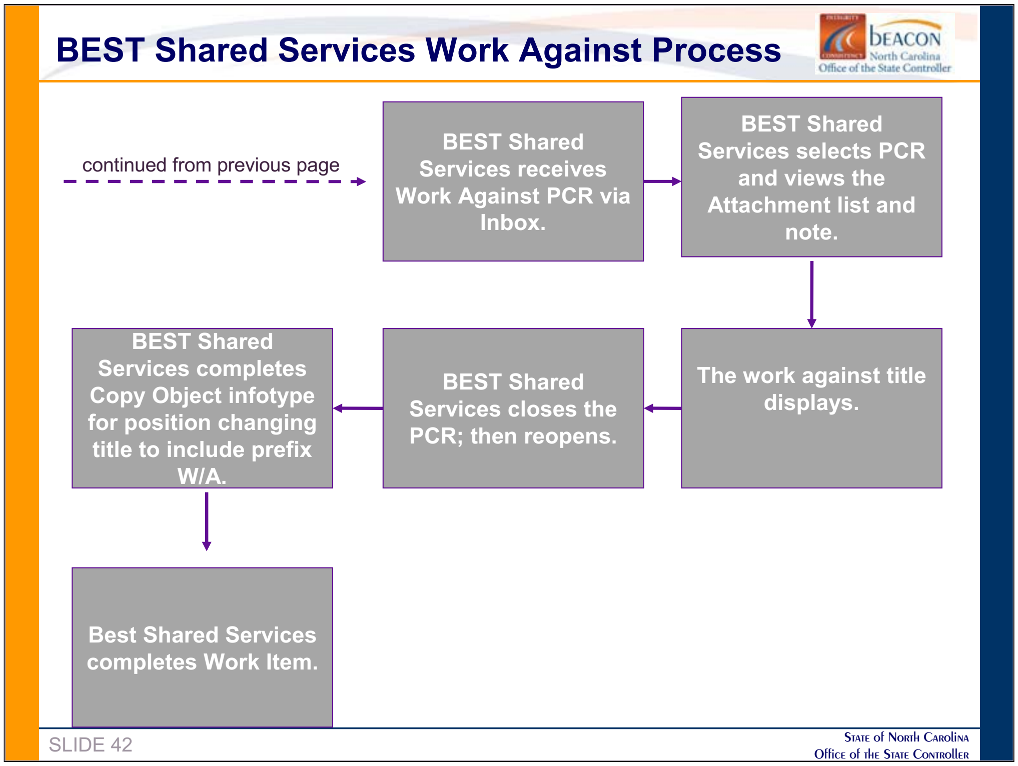

**Notes:**

It is important to understand how Work Against (WA) is used in BEACON. The various complexities of a BEACON Work Against are outlined and described below and on the following pages.

**The BEACON SAP employee group and subgroup are used to designate the employee type:** Employees are no longer hired into positions that are titled specifically to describe the employee type. For example, there are no longer position titles with the words *trainee, temporary, intern, or probationary,* etc, as part of the title. Positions are named by the working title (Engineer I, Engineer II). The employee subgroup is changed to reflect if the employee is a *trainee, probationary, time limited, grant, or temporary* employee.

**The employee and the position must have the same supervisor**: Whether the WA is for one or more employees assigned to a position, the employees and the position must report to the same supervisor.

**The employee record (HR Personnel Administration) must be updated in conjunction with the position record (BEST Shared Services)**: There is only one PA Workflow for WA, however, that one Workflow involves two separate components: PA (for the employee) and OM (for the position). You must complete the PA (employee) component of the Workflow first. Upon selecting the WA checkbox on the PA Workflow and completing the PA Action, BEST Shared Services automatically receives the OM PCR in their Inbox. BEST Shared Services must make changes to the position object name (title) based on the Work Against Workflow that you submitted.




**The position title should include the initials *W/A* as a prefix**: The position object name (title) is changed to include the prefix *W/A.* HR PA indicates the Work Against title by using the Services for Object button when creating the initial Workflow. BEST Shared Services accesses the Attachments note option to copy the Work Against title. Changing the position with this prefix ensures that reports accurately reflect all of the employees who are assigned to Work Against positions.

**A bona fide and approved job class must be used**: You cannot use an informal working title as the position title of a Work Against. The position title must be an official job (class) title. For example, Engineer IV is a valid job title. Therefore, an employee can work against an Engineer IV position, but the employee could not work against a "Safety Engineer" position.

**The timing of the employee record update and the position update must be coordinated to ensure consistency in data records**: In order for the employee's record to be correct, you must enter a Work Against with an understanding that BEST Shared Services must also complete information before the Work Against is complete. For example, if you enter a Work Against at 4:30 pm and BEST Shared Services doesn't receive and process it until late in the afternoon of the following day, the employee's record has shown an incorrect position title during that time. A best practice is to initiate your Work Against early each morning in order to ensure that BEST Shared Services has enough time to receive and process the necessary position revisions.

**Notes:**

## Examples of Correct Work Against Usage

BEACON North Carolina Office of the State Controller

- An Office of State Personnel (OSP) review lowers the employee title and grade (through no fault of the employee).
- Hire two or more employees to work against a bona fide position by following specific rules (job sharing).

*Continued…*

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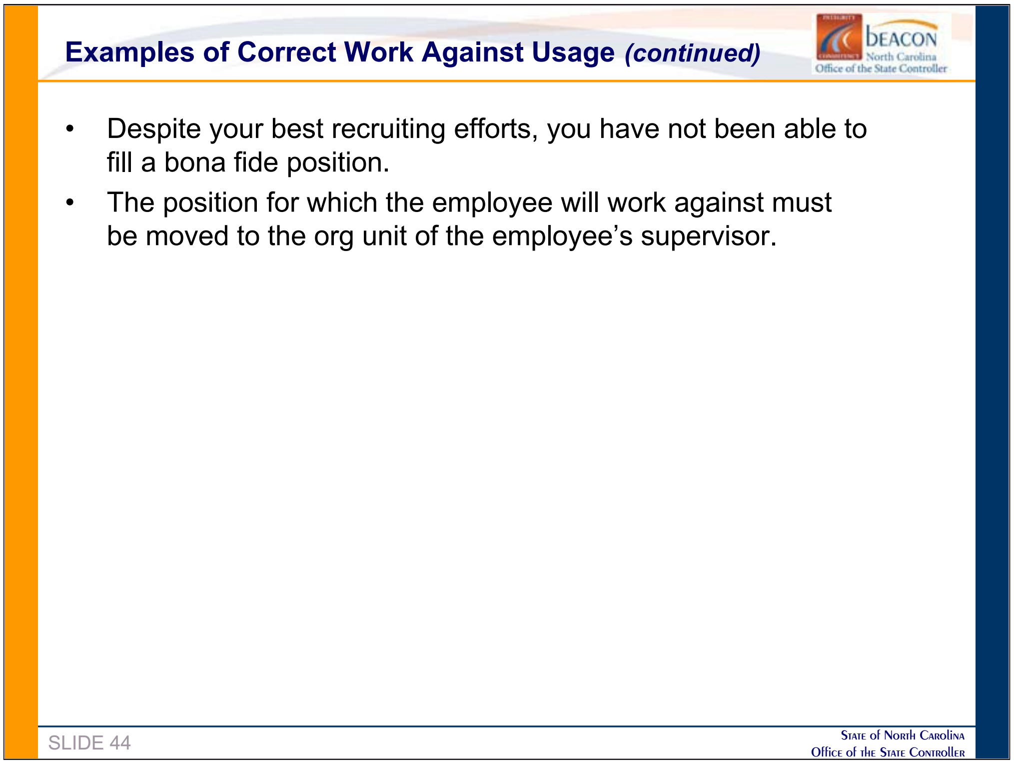
**Notes:**

**An OSP review lowers employee title and grade (through no fault of the employee)**: After a review by OSP the duties of an employee are determined to be consistent with a title and grade level lower than the one the employee currently holds. Because the lower title and grade level were through no fault of the employee he or she will be allowed to work against the current title and grade, while the position title and grade will be changed to the lower levels. Example: The employee is currently working as an Environmental Program Manager III, at an 86 grade level. After the review, the position is changed to an Environmental Program Manager I position at an 82 grade level. As long as the employee remains in the position he or she will work against the Environmental Program Manager III position, grade level 86. When the employee leaves the position the agency will recruit for the correct position (Environmental Program Manager I, grade 82 in our example).

**Hire two or more employees to work against a bona fide position (example: job sharing)**: You can hire two or more employees to work against a position that is a bona fide and approved job title. The salary, appointment type and work schedule for each of the employees may be the same or may be different from each other. However, when hiring two or more employees to work against a position you must follow these additional rules:

- The total cannot exceed one full-time equivalent position.
- The combined salary of the employees cannot exceed the total amount budgeted for the position.
- The classification, supervisor and all other attributes must be the same for all employees working against the position.



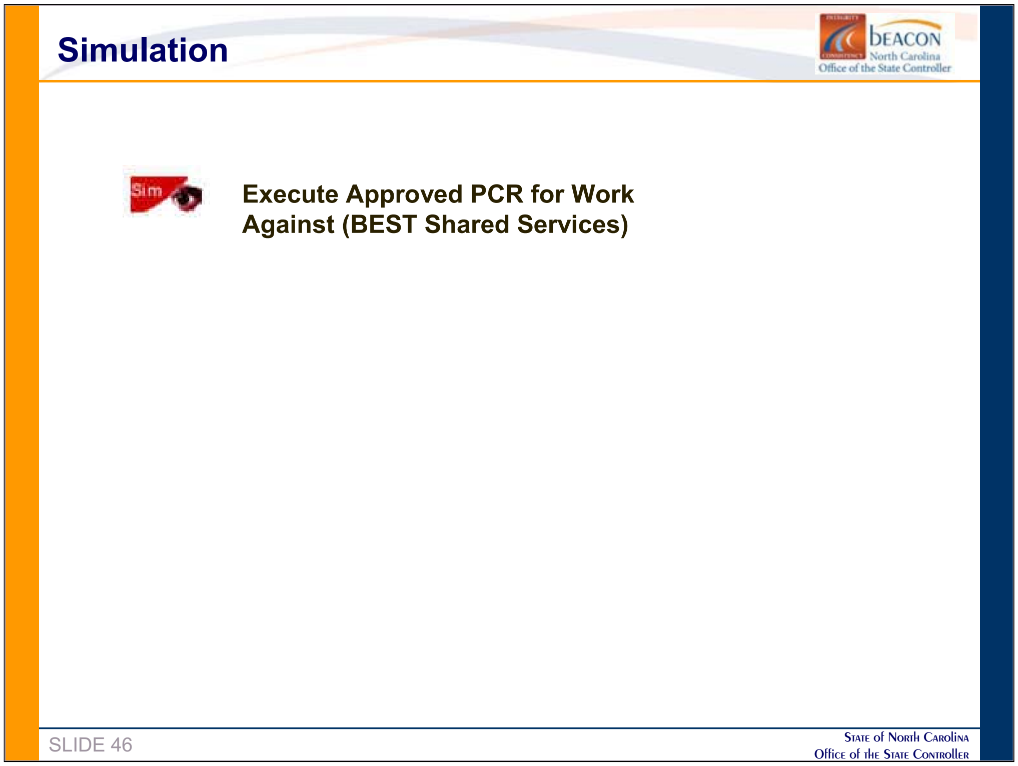

## Notes:

**Despite your best recruiting efforts you have not been able to fill a bona fide position**: You have an open position that is a bona fide and approved job title. Despite your best recruiting efforts you have not been able to fill that position. You can hire an employee to work against that position, as long as the person you are hiring and the position both report to the same supervisor.

**The position for which the employee will work against must be moved to the org unit of the employee's supervisor**: You have an open position in an org unit reporting to a different supervisor than the employee for which you would like to assign a work against. You must first <u>move</u> the position to the org unit of the employee's supervisor. After the position has been moved you can then process the Work Against.


The first simulation demonstrates how to initiate a Work Against Workflow for an Action. Although the simulation is for a promotion the process is similar for all other actions.

**Notes:**




**Notes:**

This next simulation shows the steps that BEST Shared Services takes when they received the Work Against PCR in their inbox.

## Activity:

- Answer the questions in your Exercise Guide pertaining to Work Against.

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Office of the State Controller

**Notes:**

## Lesson Review

BEACON North Carolina Office of the State Controller

In this lesson, you learned to:

- Describe the Work Against rules and processes
- Identify when it is appropriate to use Work Against
- Describe why a trainee is no longer a Work Against
- Identify the applicable Work Against Actions

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**Notes:**

## Course Map

BEACON North Carolina Office of the State Controller

- Lesson 1: PA310 Review
- Lesson 2: Transfers
- Lesson 3: Work Against
- **Lesson 4: Leave of Absence**
- Lesson 5: Career Progression
- Lesson 6: Reallocation
- Lesson 7: Dual Employment
- Lesson 8: Additional Actions
- Lesson 9: Course Review

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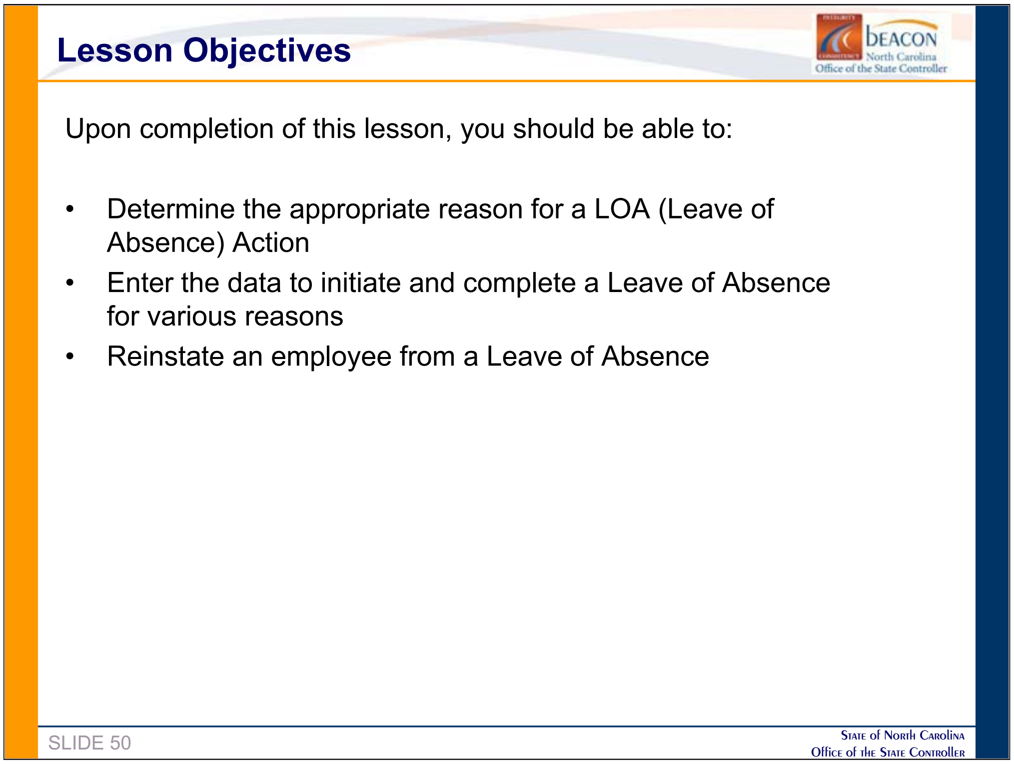
**Notes:**


Lesson Objectives
BEACON North Carolina Office of the State Controller
Upon completion of this lesson, you should be able to:
• Determine the appropriate reason for a LOA (Leave of Absence) Action
• Enter the data to initiate and complete a Leave of Absence for various reasons
• Reinstate an employee from a Leave of Absence
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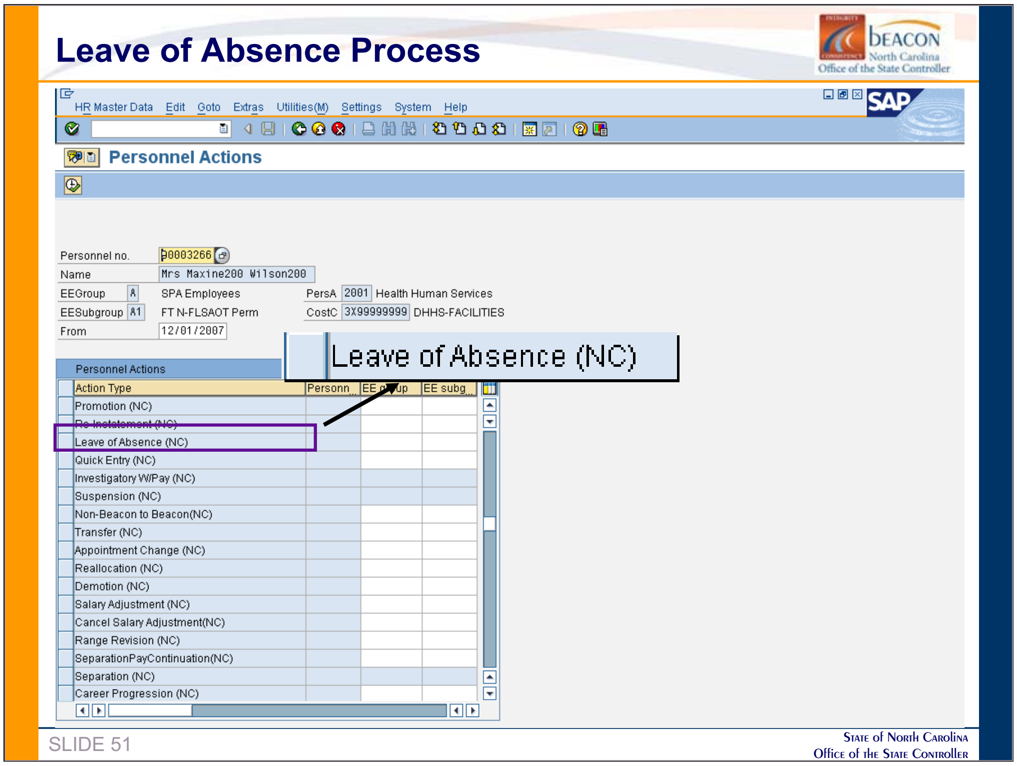
State of North Carolina Office of the State Controller

**Notes:**

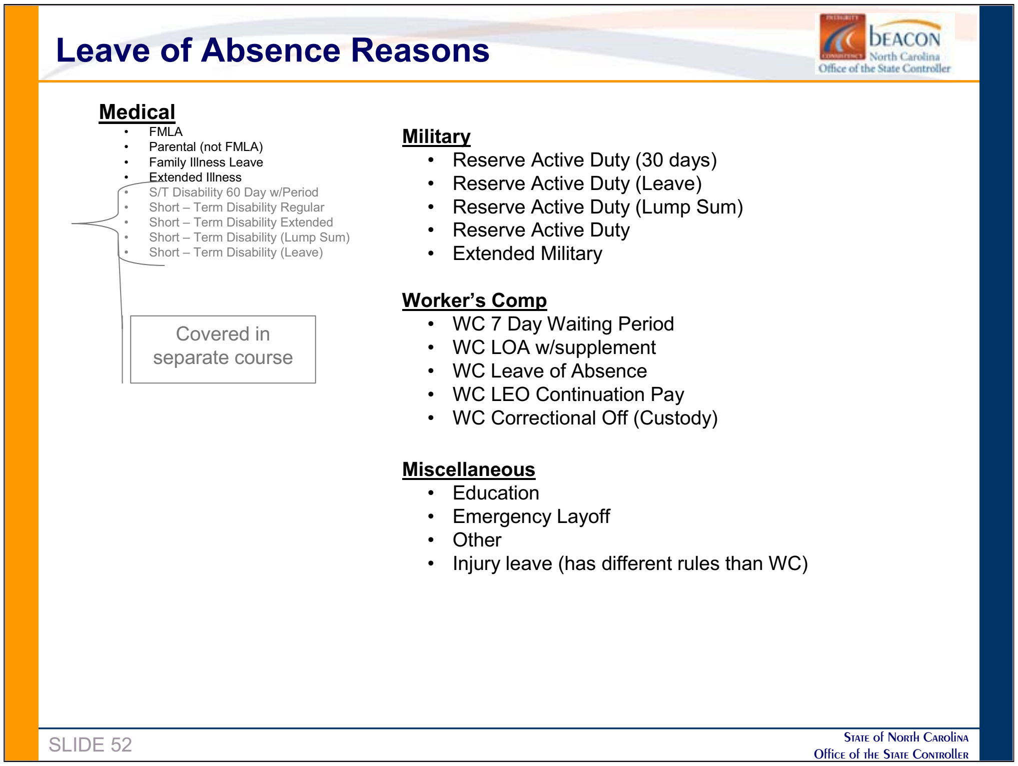



## Notes:

A **Leave of Absence** occurs when an employee is out of work on paid or unpaid leave. You will observe there is only one LOA Action with no indication about whether it is paid or unpaid (LOA replaces LWOP). To aid in tracking employee leave activities, BEACON has added more LOA reasons than PMIS had, especially for WC and Military.

**Reasons associated with the LOA Action**

- FMLA
- Family Illness Leave
- Reserve Active Duty (30 days)
- Reserve Active Duty (Lump Sum)
- WC LOA w/supplement
- WC LEO Continuation Pay
- Injury Leave
- S/T Disability 60 Day w/Period
- Short-Term Disability Extended
- Other
- Reserve Active Duty
- Extended Military
- Parental (not FMLA)
- Extended Illness
- Reserve Active Duty (Leave)
- WC 7 Day Waiting Period
- WC Leave of Absence
- WC Correctional Off (Custody)
- Education
- Short-Term Disability Regular
- Short-Term Disability (Lump Sum)
- Emergency Layoff
- Short-Term Disability (Leave)




**Notes:**

Although the reasons are shown in SAP in a list you can mentally group them into four categories as illustrated above.

Short-term disability is not discussed in this course. It is covered in a separate course titled *PA370 Short-Term Disability.*

### Time Administration and FMLA

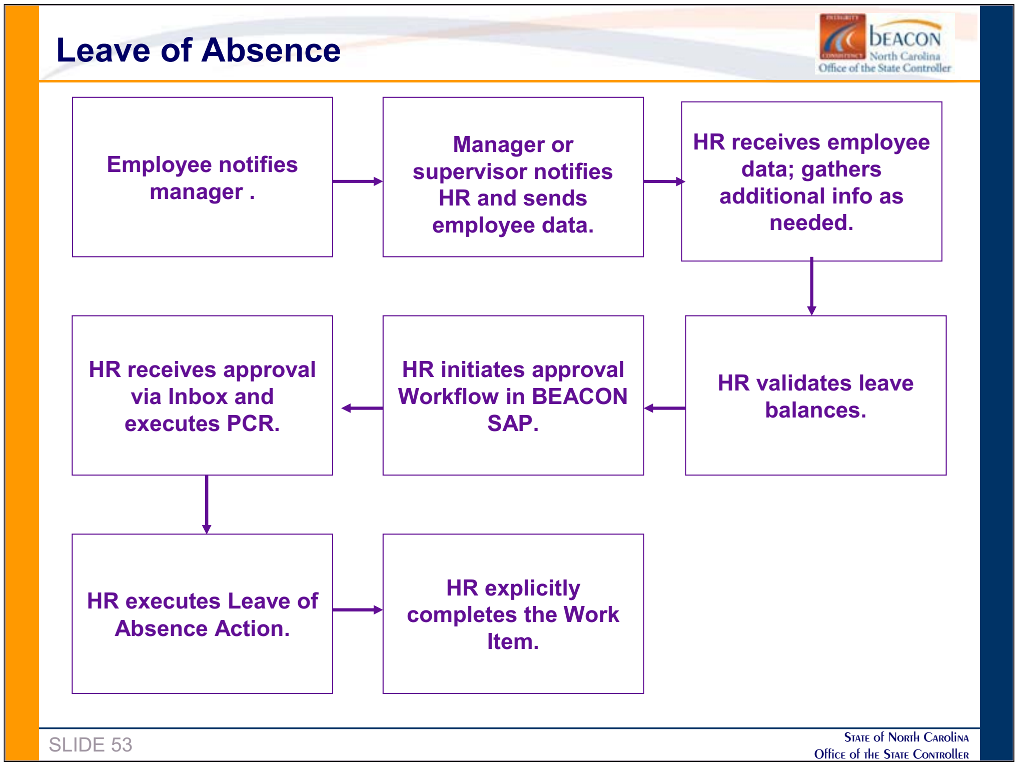
The LOA Action executed by PA is processed in conjunction with Time Administration. Time Administration is responsible for the **tracking** of FMLA eligibility and number of hours that the employee has used. The Family Medical Leave Workbench (transaction PTFMLA) handles all processes related to the management of FMLA and FIL events.

When the FMLA/FIL event is entered by Time, the FMLA Workbench automatically checks an employee's eligibility for FMLA or FIL. Based on OSP policy, an employee's eligibility is related to his or her length of State service and hours worked during the previous 12 months.

After an employee has exhausted all of his or her leave entitlement, the FMLA Workbench will also manage his or her eligibility for subsequent leave entitlements.

### Intermittent FMLA

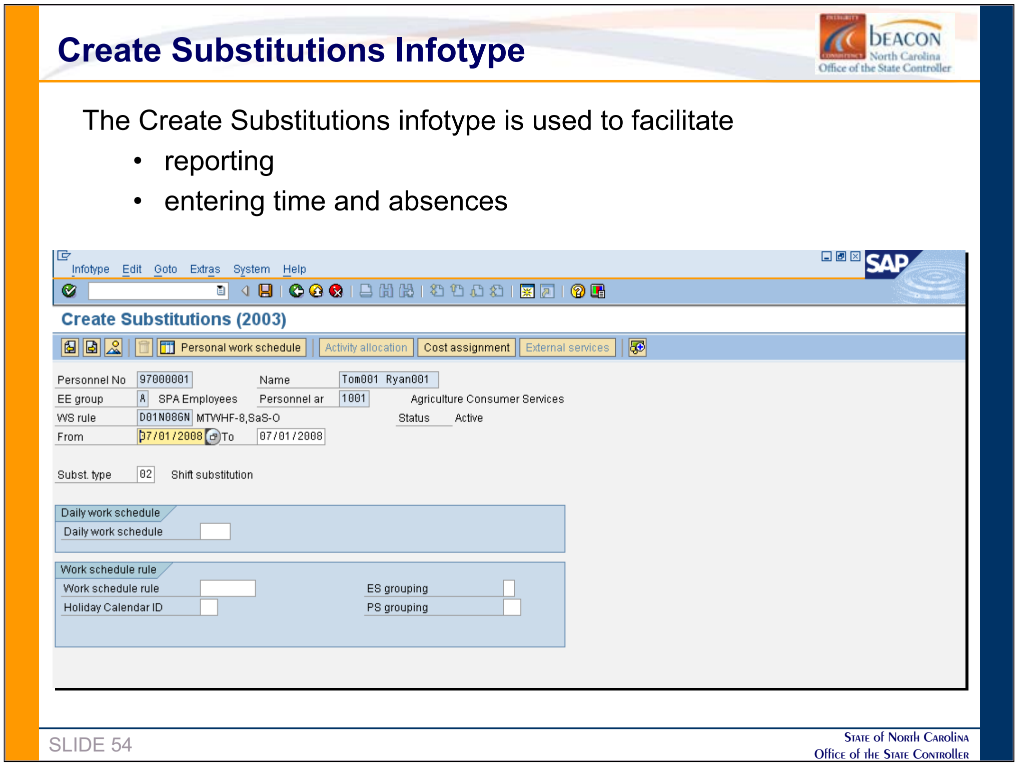
If an employee is absence intermittently on FMLA, you do not execute a LOA Action. In that case, the Time Administrator enters the FMLA event using PTFMLA and Leave Administrator tracks absences associated with the FMLA event.




**Notes:**

LOA is used to track various activities regarding an employee's leave of absence. As a result, you may need to make more than one entry for the Action (along with the associated reason) when an employee is on LOA (refer to the LOA Processing job aid online at BEACON University). However, instead of having only one entry (as in PMIS), you will now have a complete history of the activity applicable for a particular leave. You can write comments on many of the infotypes when entering a LOA. In addition, you will be able to report based on reasons. Take for example a BEACON employee who is going on an 18-month military leave. At the end of his or her orders the employee volunteers for an additional six months. In BEACON, four LOA entries, with applicable reasons, would be required to record this employee's leave history:

1. LOA Action – reason—either: Reserve Active Duty (Leave) or Reserve Active Duty (Lump Sum)—depending upon whether or not the employee will exhaust or will be paid for leave prior to the 30 days
2. LOA Action - reason: Reserve Active Duty (30 days)
3. LOA Action – reason: Reserve Active Duty (entered on the 31st day of duty)
4. LOA Action – reason: Extended Military (entered after the employee's original orders were completed and the employee volunteered for additional duty)--granted for all uniformed service duty that is not covered by military leave with pay as defined by policy for active/inactive duty training, physical exams, and reserve active duty.




## Notes:

**Date**: The substitution is directly related to the Action, therefore, the ***From*** date should be the date of the Action, and the ***To*** date should be 12/31/9999 since the end date of the Action is not usually known at the time of the LOA.

**Substitutions type**: Select the applicable type for the Action:

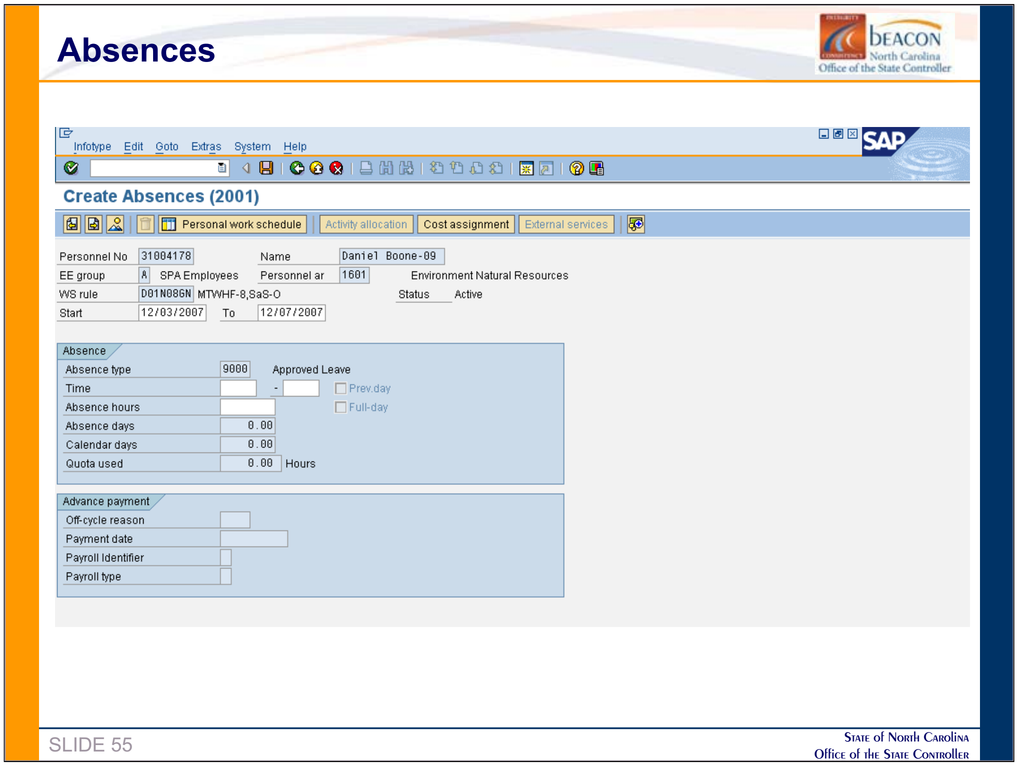
- 05 LOA Generic – select when none of the other subtypes apply
- 10 LOA FMLA – select if employee is on Family Medical Leave
- 11 LOA WC Regular – select if employee is on Workers' Compensation (ex. Engineer)
- 12 LOA WC Salary Cont – select if employee is on Workers' Compensation Salary Continuation (ex: Law Enforcement Officer)
- 13 LOA Military – select if employee is on Military Leave

  **NOTE:** Additionally, the SAP subtype list includes Short-Term Disability subtypes, which are not covered in this course.

**Daily work schedule**: Leave blank.

**Work Schedule Rule**: If the employee is full-time (40 hours a week), enter work schedule D01N08GN into the Work Schedule rule field. The other fields on the infotype will default with the appropriate information for the employee. If the employee is part-time (less than 40 hrs/week), enter a '3' in the ES grouping field. Use the matchcode in the Work schedule rule field to select the appropriate part-time schedule for the employee.

Call BEST Shared Services for help in determining the correct work schedule.




**Notes:**

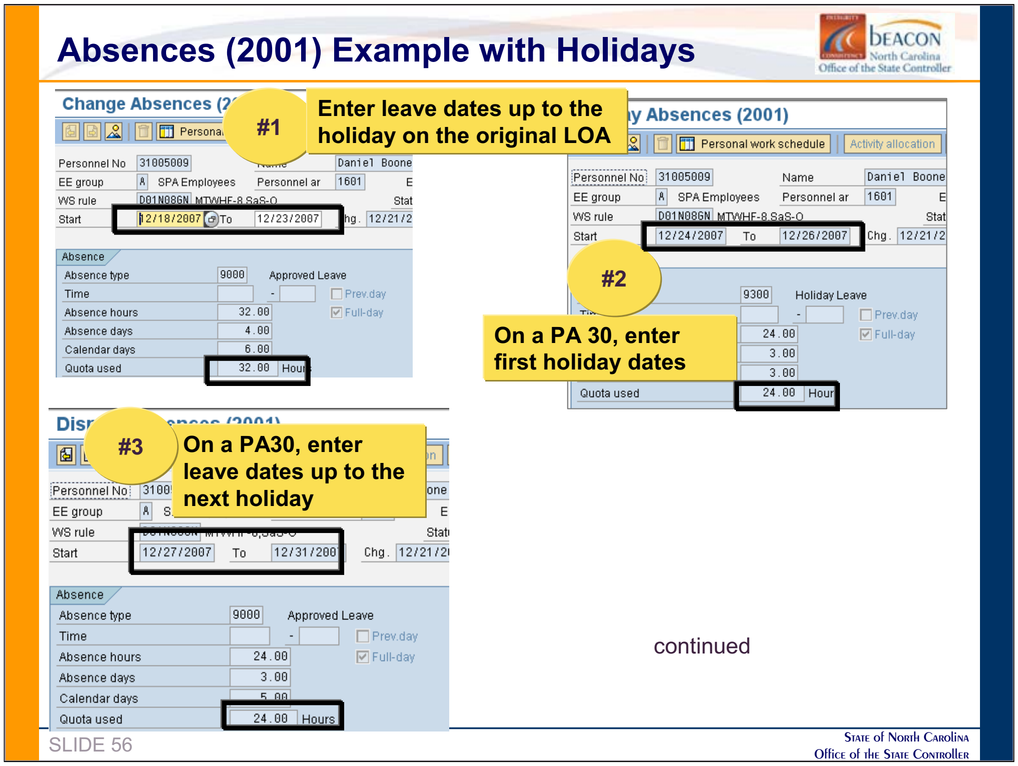
The Absences infotype (2001) indicates the number of hours the employee wants to exhaust for leave. The dates you enter on the Absences infotype should align with the number of hours the employee wants to be paid out for leave. For instance, if you were creating IT2001 for the week of 12/3/07 through 12/7/07, you would enter those dates in the **Start** and **To** fields.

In the above example the employee is full-time. Therefore, on the Substitution infotype (2003), the work schedule rule (**D01N08GN**) that was entered (just prior to the Absences infotype) indicated that the employee was expected to be at work eight hours a day for a total of 40 hours. As a result, a total of 40 hours will default into the hours field on the Absences infotype.

The hours that default are based on the work schedule rule entered on the Substitution infotype combined with the dates you enter on the Absences infotype.

Every employee on any type of leave must be put on actual pay (positive time). After you complete the LOA Action you should review the Planned Working Time infotype (0007) and verify that the employee Time Management Status is 1. If not, use PA30 to copy the infotype and change the status accordingly.

Because BEACON is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered. If the Create Absences infotype is not completed, the employee is on leave without pay.




## Notes:

If the employee is exhausting leave during a time that includes a holiday, additional 2001 infotypes will be necessary to allow the employee to take holiday leave. The additional 2001 records are created in transaction PA30. For example, assume an employee is going out on military leave on December 18 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there are two holiday periods (12/24 – 12/26 and 1/1/2008). Your entries would be as follows:

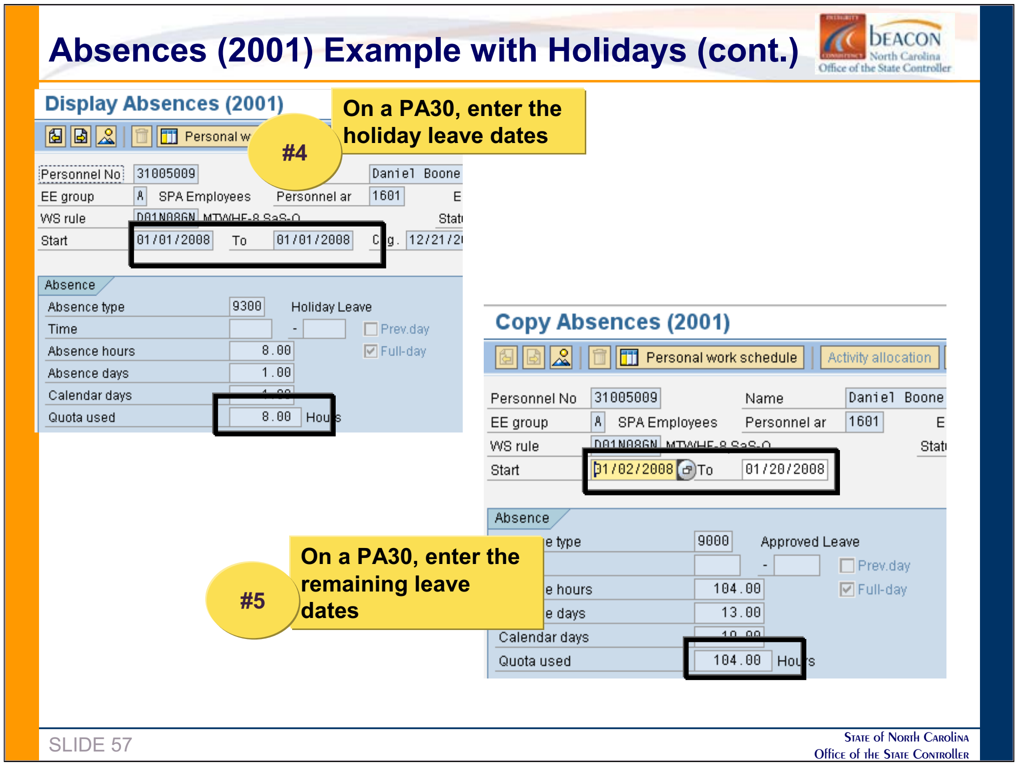
1. During the LOA Action, on the Absences (2001) infotype, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:

   Start: 12/18/2007 To: 12/23/2007 (32 hours **leave**)

   By entering the dates above the system calculates that four working days fall within the date range. The substitution previously created issues an 8 hour workday for the employee; therefore, 32 hours default into the Absence hours field.

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

   Start: 12/24/2007 To: 12/26/2007 (24 hours **holiday**)




**Notes:**

3. Create a PA30 to enter the next leave period **up to** the next holiday, infotype 2001, subtype 9000:

   Start: 12/27/2007 To: 12/31/2007 (24 hours **leave**)

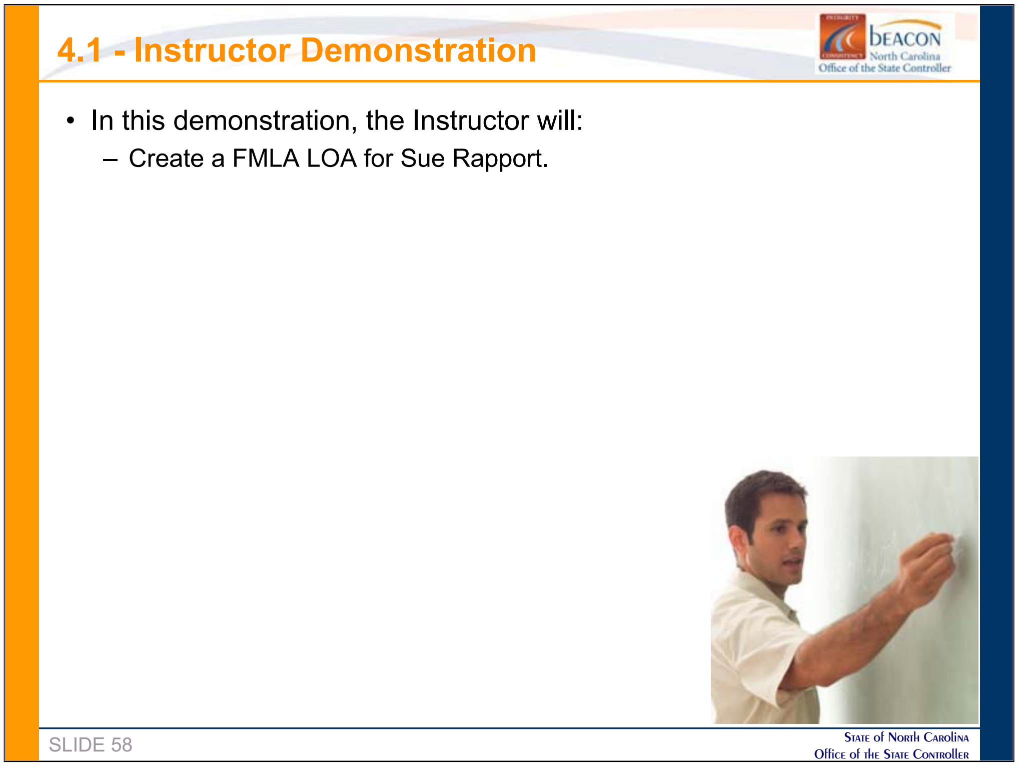
4. Create a PA30 to enter the next holiday period, infotype 2001, subtype 9300:

   Start: 01/01/2008 To: 01/01/2008 (eight hours **holiday**)

5. Create a PA30 to enter the remaining leave, in this case 104 hours, infotype 2001, subtype 9000

   Start: 01/02/2008 To: 01/20/2008 (104 hours **leave**)

By entering the data on the Absences infotype as explained in this manner it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype, the employee is on leave without pay.




**Notes:**

The instructor will use the student's scenario to demonstrate the exercise.

## 4.2 - Exercise

- LOA – FMLA

Sue Rapport is a permanent employee who works at the Department of Commerce. She has the following leave balances: six weeks of sick and six weeks of vacation. Effective today, she is going out on FMLA due to her husband's (Bill) serious medical condition. She expects to be gone for 12 weeks.

Assume you have already submitted Workflow, have received the approval via Inbox, and have executed the PCR.

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Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

**Notes:**

## 4.3 - Exercise

- LOA – Worker's Compensation

Tom Ryan works in a permanent long distance truck driver position at the Department of Agriculture. His current salary is $32,000. He has the following leave balances: 200 hours bonus leave, 600 hours sick leave, and 80 hours of vacation. Today, he injured his back while unloading his truck. He will be unable to work for six months.

Tom wants to use 40 hours of vacation during his 7-day waiting period. He is entitled to and wants to receive two hours per week of supplemental pay during the six month period. In order for Tom to receive the supplemental pay, you should notify the Time Administrator so that the Time Administrator can go in each week for the 6 months that the employee is out on WC LOA and add 2 hours supplemental time each week.

Assume you have already submitted Workflow, have received approval via Inbox, and have executed the PCR.

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**Notes:**

**When the 7 days are consecutive**

The day the injury occurred is the first day of the 7-day waiting period and is therefore not counted as part of the 7 days (you are counting **calendar** days).

**When the 7 days are not consecutive**

If an employees takes the 7 days waiting period in non-consecutive days, you will enter several LOA Actions. See the explanation in the *Exercise Guide* on how to process the 7 day waiting period when it is used in non-consecutive days.

**When to include weekends**

If the doctor's note takes the employee out on Friday and indicates the employee can return on Monday, you would count the weekend as part of the 7 day waiting period. However, if the employee gets hurt early in the week, but is back at work on Friday, then out again on Monday, you would not count the weekend.

## 4.4 - Exercise

- LOA – Military
  - Daniel Boone is a permanent employee at the Department of Cultural Resources. His longevity date is January 1, and he has the following leave balances: 150 hours of vacation, 200 hours of bonus and 120 hours of sick leave. Assume today is May 5, 2008 and he receives active duty orders for 18 months. He is not eligible for differential pay. He wants to use a combination of vacation and bonus (160 hours) leave for the first 30 calendar days prior to starting his 30 days Reserve Active Duty.
- Assume you have already submitted Workflow, have received the approval via Inbox, and have executed the PCR.

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**Notes:**

**Differential pay**

If an employee is eligible for differential pay it is paid through Accounts Payable (not by BEST Shared Services Payroll). Therefore, you must coordinate with your Accounts Payable Office to ensure that you send them the appropriate paperwork so the employee is paid his or her differential while out on military leave.

**Processing LOA military 30 days when employee also want to exhaust leave**

According to the State Personnel Manual, you should enter the military 30 days (LOA – reason: 09 – Military Active Duty [30 days] before you enter the leave to exhaust the employee's leave (LOA – reason: 10 – Reserve Active Duty [Leave]) .

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

## 4.5 - Exercise

- Reinstatement
  - Tom Ryan (the same employee in Exercise #4.2) has fully recovered and is released to return to work. Assume today is six months since the effective date of his initial LOA. Reinstate Tom from LOA. You can refer back to the date you entered on his Monitoring of Tasks as the estimated return date to use as the effective date for this Action.

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**Notes:**

**Date Specifications infotype when you are reinstating LOA employee.** Observe that when you return an employee from LOA, on the Date Specifications infotype (0041), the Agency date automatically populates to the date of the Action. If the employee was on LOA without pay, you should adjust that date by the months the employee was out without pay. If the employee doesn't work half the workday or get paid half the workdays he or she does not get credit for that month.

**Reinstate an employee from WC trial rehab working less than 40 hours:**

1. Enter a Reinstatement Action with WC Trial Rehab as the reason on the appropriate effective date.
2. After you complete the Reinstatement Action, use PA30 with the same effective date. Create a Substitutions infotype (2003) putting the employee on Work Schedule D15N04GN (4 hrs) or equivalent. **NOTE**: If the employee is part-time (less than 40 hrs/week), enter a '3' in the ES grouping field. Use the matchcode in the Work schedule rule field to select the appropriate part-time schedule.
3. Use PA30 (same effective date) and use the copy button to revise the annual salary. Example: The employee is working 4 hours and receiving 4 hours WC; the annual salary will change by 50%.
4. The Leave Administrator will need to adjust holiday quotas as required.
5. The employee will enter time worked on a timesheet.

## 4.6 - Exercise

- Leave of Absence – FIL
  - Sue Rapport (the same employee as Exercise #4.1), has exhausted her 12 weeks of FMLA. Her husband is still unable to stay alone, and Sue requests an additional three weeks of leave for Family Illness Leave (FIL). She choose not to use leave.
  - Assume you have already submitted Workflow, have received the approval via Inbox, and have executed the PCR.

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Office of the State Controller

**Notes:**

Use the data assigned in the Exercise Guide to complete the exercise. Use eAssistant for step-by-step instructions.

## Lesson Review

BEACON North Carolina Office of the State Controller

In this lesson, you learned to:

- Determine the appropriate reason for a LOA (Leave of Absence) Action
- Enter the data to initiate and complete a Leave of Absence for various reasons
- Reinstate an employee from a Leave of Absence

SLIDE 64

State of North Carolina
Office of the State Controller

**Notes:**

## Course Map

- Lesson 1: PA310 Review
- Lesson 2: Transfers
- Lesson 3: Work Against
- Lesson 4: Leave of Absence
- **Lesson 5: Career Progression**
- Lesson 6: Reallocation
- Lesson 7: Dual Employment
- Lesson 8: Additional Actions
- Lesson 9: Course Review

SLIDE 65

State of North Carolina
Office of the State Controller

**Notes:**

## Lesson Objectives

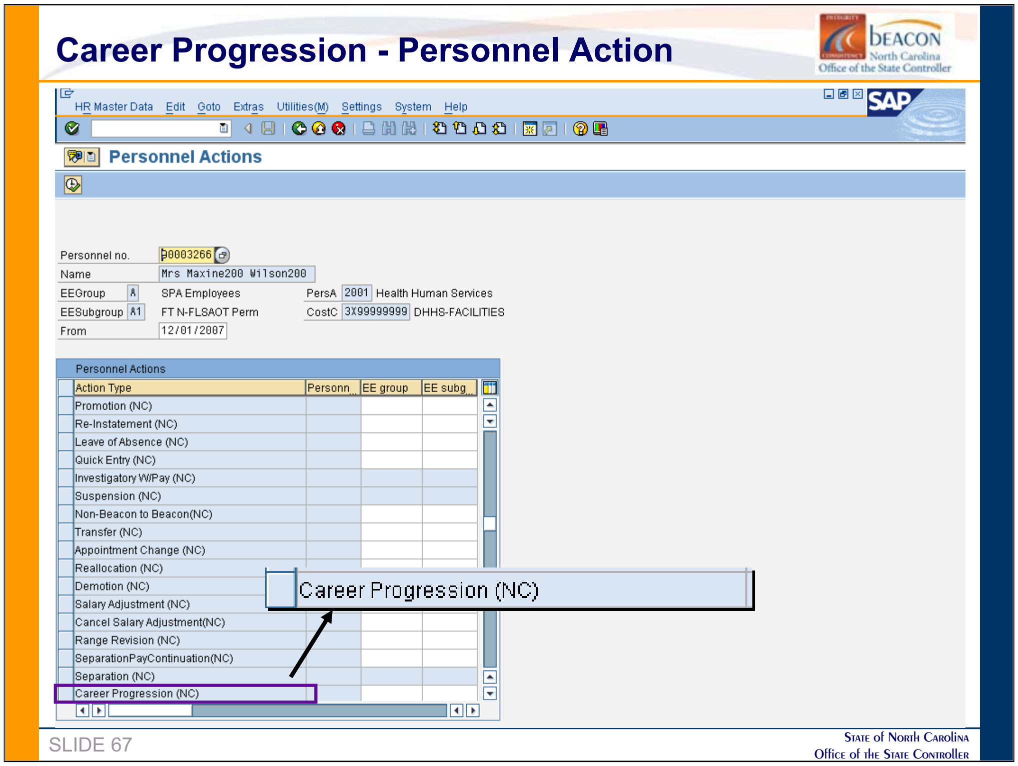
Upon completion of this lesson, you should be able to:

- Describe the career progression process and associated reasons for the action
- Describe if or how salary is impacted
- Enter the applicable data to initiate and complete a career progression

SLIDE 66

State of North Carolina
Office of the State Controller

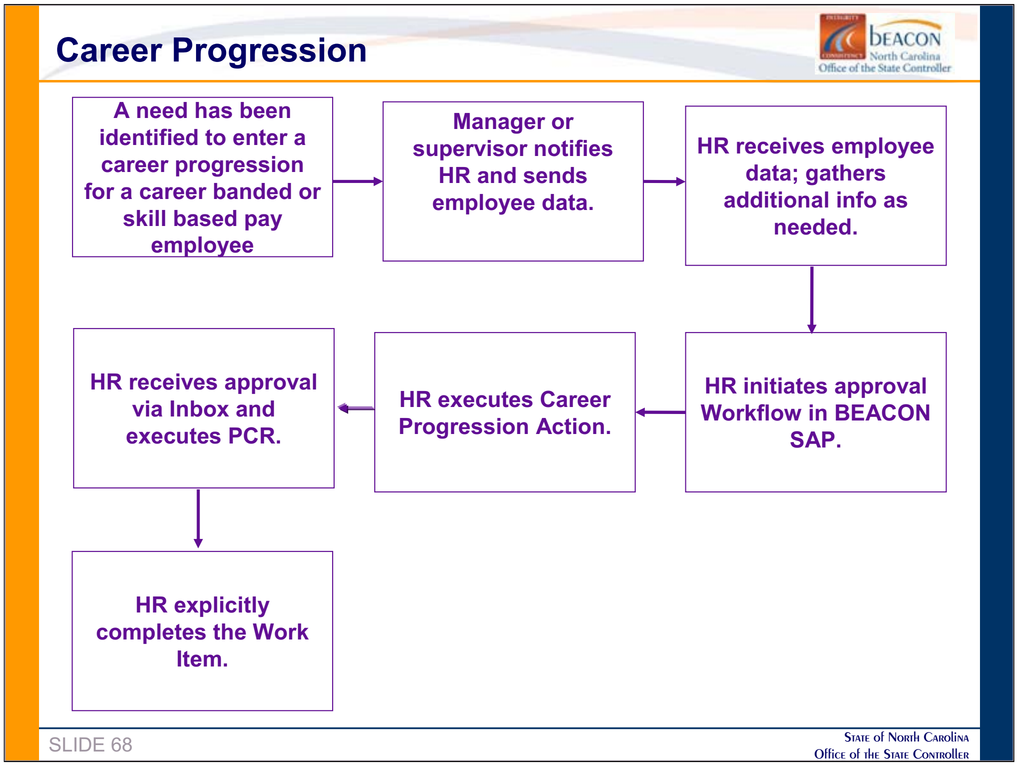
**Notes:**




**Reasons associated with the Career Progression Action**

- Grade-Band Transfer
- CP-Comp/Skill
- CP-Labor Market
- CP-Comp Level Change
- Broad Band Level change
- Broad Band Job change
- Broad Band Salary Adjustment

**Notes:**




## Notes:

A Career Progression is used for banded and graded classes and may be granted in conjunction with demonstrated competencies or as justified through the labor market. For example, an employee was hired at a *contributing* level and given certain goals to reach to advance to the *journey* level. After the employee achieves goals his or her manager requests that the position be changed to journey. HR will then execute the Career Progression Action on the employee.

Career Progression is used when pay factors support a salary adjustment within the pay range of the career-banded class and when the employee attains and uses more advanced competencies in same position. Salary eligibility is based on application of all F.A.I.R.* pay factors. When an employee demonstrates required competencies in a position but is not yet at market index, s/he may receive a Career Progression.

Employees with active warning/disciplinary actions or with overall *below good* or *unsatisfactory* ratings are **not** eligible for a career progression adjustment based on competency assessment.

* F.A.I.R.

F Financial Resources

A Appropriate Market Rate

I Internal Pay Alignment

R Required Knowledge, Skills, and Abilities

## Reasons for a Career Progression Action

- Grade Band Transfer
- CP – Comp/Skill
- CP – Labor Market
- CP – Comp Level Change

*Continued…*

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State of North Carolina
Office of the State Controller

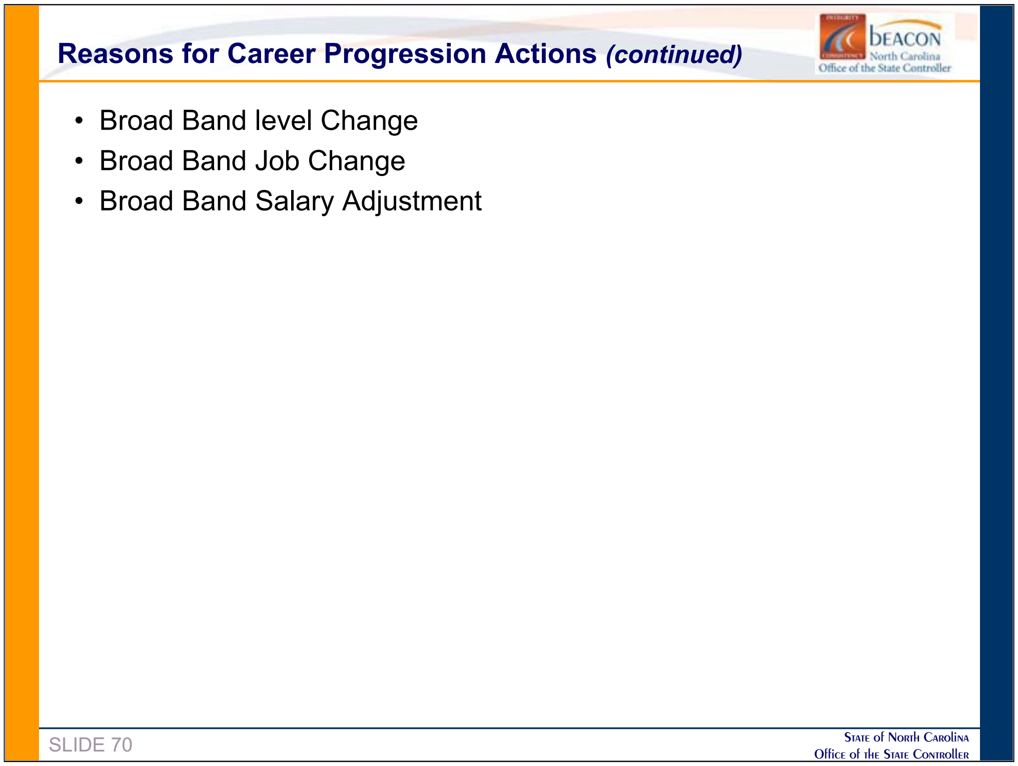
- **Grade Band Transfer** – employee movement between banded and graded classes.

- **CP-Comp/Skill** - pay factors support a salary increase within the pay range of the employee's career-banded class in conjunction with the employee's attainment and demonstrated use of competencies in the same position. Overall competency level may or may not change. If a salary increase is not granted due to funding issues, and competency level does not change, a Career Progression Action is not processed.

- **CP-Labor Market** – an employee's salary is low in relation to market guidelines applicable to the employee's competencies, and a salary increase is in order. Such a situation could be due to an adjustment in the banded class market rates in conjunction with a labor market study, implementation of a market reference rate with the agency/university, insufficient funding at time of career banding implementation to pay employee at appropriate rate, or removal of an internal equity/pay alignment issue that had prevented an employee from being paid at appropriate competency rate.

- **CP-Comp Level Change** – employee's competency level changes although a salary increase is not granted. Employee's attainment and demonstrated use of competencies results in a higher overall competency level. However, due to funding issues, or because employee's salary already exceeds the appropriate rate, salary is not increased.

**Notes:**




- **Broad Band Level Change** – a change in the level to which an employee is assigned.

- **Broad Band Job Change** – a transfer of an employee from one banded occupational group to another banded occupational group. This may or may not involve position number and salary change. The Object ID (job) must change, therefore, you must coordinate with Organizational Management. If a salary change is involved, the reason for the adjustment and justification for any increase exceeding 10% should be included in the **Comments** section.

- **Broad Band Salary Adjustment** – Career Banding Grade – Band Transfer Adjustment – use of this reason must be approved by the Office of State Personnel /Office of State Budget and Management (OSP/OSBM.)

**DENR and DOT**

- In BEACON, the Department of Energy and Natural Resources (DENR) will use a Salary Adjustment Action with the In Range Other Labor Market as the reason. The agencies will not use a Career Progression Action to increase employees pay for skills blocks or Skills Based Pay (SBP).

- The Department of Transportation (DOT) is currently using a Salary Adjustment Action for SBP and will continue doing so with In Range Labor Market as the reason. For more information about SBP for DENR and DOT, contact the Office of State Personnel.

**Notes:**

## 5.1 - Exercise

Career Progression

- Frankie Lucas, a LEO Agent at DENR-Marine Fisheries is currently at the Contributing Level and has obtained the skills required to advance to the Journey Level.

**NOTE**: If the employee's position isn't at the appropriate level, you will need to coordinate with your Agency OM to have the position changed before you can process the Action.

Assume you have already submitted Workflow, have received the approval via Inbox, and executed the PCR.

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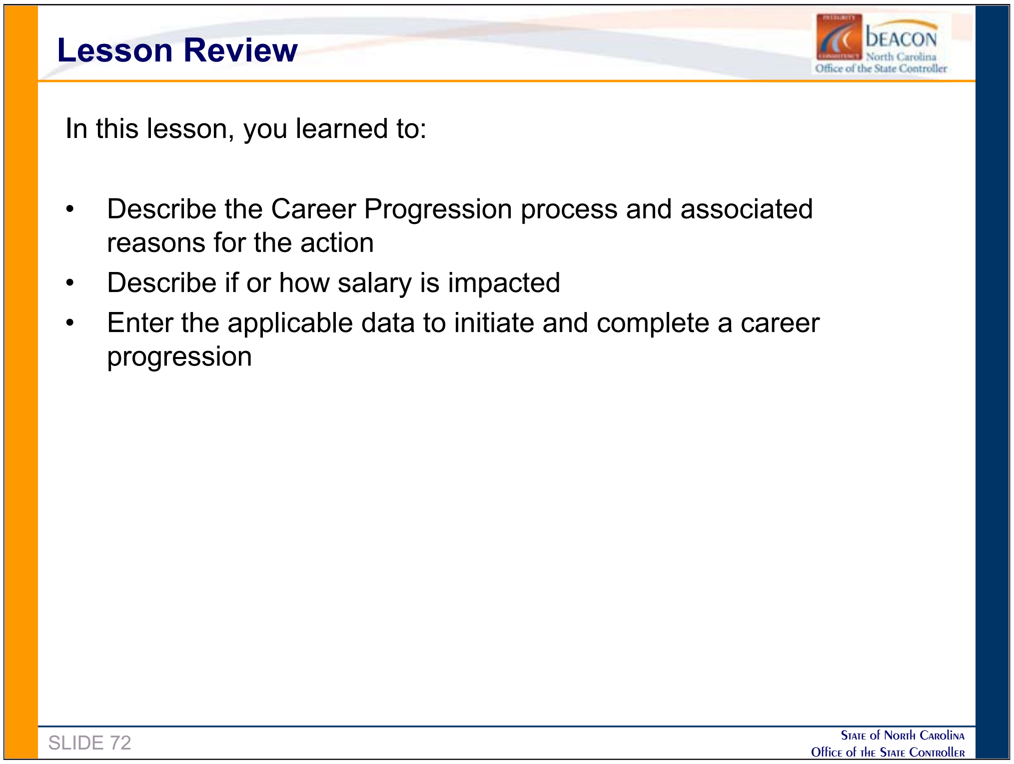
State of North Carolina
Office of the State Controller

**Notes:**

Use the data assigned in the Data Guide to complete the exercise.
Use eAssistant for step-by-step instructions.


Lesson Review
BEACON
North Carolina
Office of the State Controller
In this lesson, you learned to:
• Describe the Career Progression process and associated reasons for the action
• Describe if or how salary is impacted
• Enter the applicable data to initiate and complete a career progression
SLIDE 72
State of North Carolina
Office of the State Controller

**Notes:**


Course Map
BEACON
North Carolina
Office of the State Controller
Lesson 1: PA310 Review
Lesson 2: Transfers
Lesson 3: Work Against
Lesson 4: Leave of Absence
Lesson 5: Career Progression
Lesson 6: Reallocation
Lesson 7: Dual Employment
Lesson 8: Additional Actions
Lesson 9: Course Review
SLIDE 73
State of North Carolina
Office of the State Controller

**Notes:**

## Lesson Objectives

beACON North Carolina Office of the State Controller

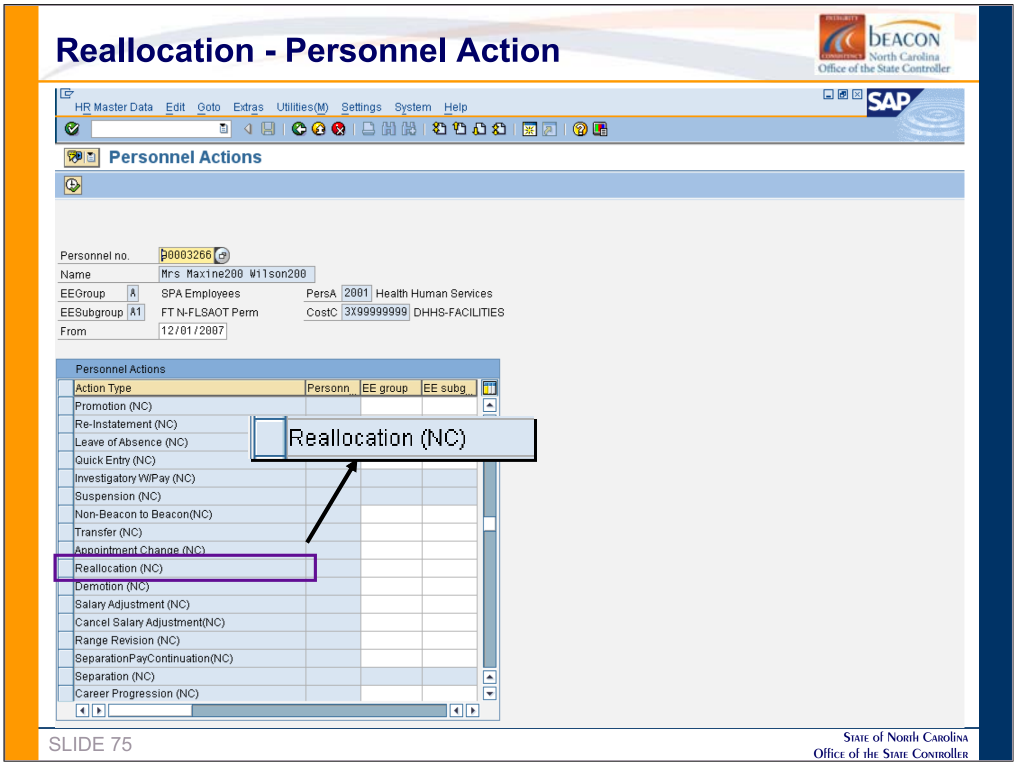
Upon completion of this lesson, you should be able to:

- Describe the Reallocation process and associated reasons for the Action
- Enter the applicable data to initiate and complete a Reallocation Action
- Identify the position adjustment that must be made prior to initiating a Reallocation
- Describe the additional steps needed when funds are not available

SLIDE 74

State of North Carolina
Office of the State Controller

**Notes:**




Reallocation is the assignment of a position to a different classification, documented through data collection and analysis according to customary professional procedure and approved by the Agency HR or OSP.

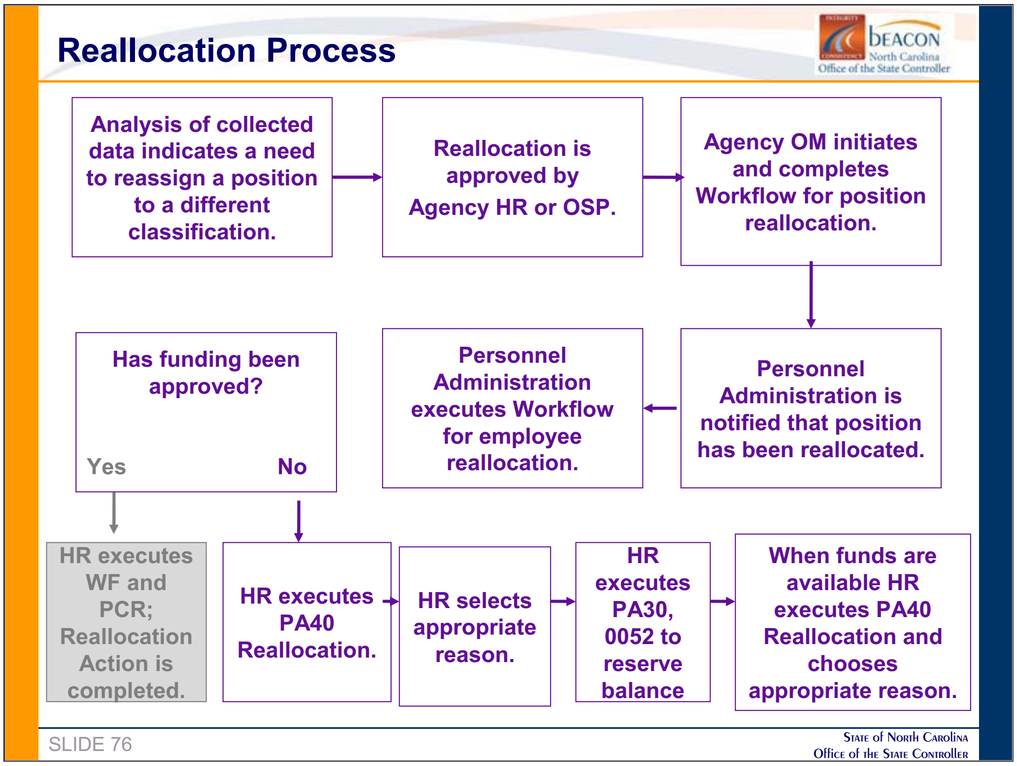
For purposes of the Salary Adjustment Fund, the following references are considered reallocations:

- Reallocation – assignment of a graded or banded position to a higher level classification to recognize higher level duties.
- Grade-Band Transfer – initial reallocation of graded positions to banded classes where salary increases are required to recognize higher level duties (see the *Career Banding Salary Administration Policy*).

**Reasons associated with the Reallocation Action**

- Reallocation Up
- Reallocation Inc – After Effective Date Complete
- Reallocation Inc Partial
- Reallocation Down
- Reallocation Horizontal

**Notes:**




## Notes:

There are two components to a Reallocation: OM and PA. The Agency OM must first initiate Workflow to process the change to the position. This must be done before Personnel Administration initiates the Reallocation Workflow for the employee. In the past you processed a 118 and then a 105; now OM must be completed first.

If funding is available HR PA initiates the Action with the applicable reason, salary changes are made, and the Action is completed. If funding is ***not*** available HR PA still initiates the Reallocation Action and chooses the appropriate reason for the employee. In this case, HR must then execute **PA30** Maintain Master Data (infotype 0052-subtype 0200 Wage Maintenance) to reserve the balance. Enter the amount of the reallocation, not the entire salary.

If later some (or all) of the funds become available, you would process a series of Reallocations and PA30s to give the funds to the employee, thus reducing the balance. For example, assume that you put $1,500 in reserve for the employee who earns an annual salary of $25,000. A few months later $500 of is released. You would initiate the Workflow for the Reallocation using the date you were notified that funds were available, ***not*** the original Reallocation date. Your reason for the Reallocation would be Real Inc Partial. On infotype 0008, the salary amount would be the old salary plus the *released* reserve, in this example $25,500.

The last step is to use PA30 to create infotype 0052-subtype 0200 Wage Maintenance and reduce the reserve balance by the amount released, in our example by $500.

## 6.1 - Scenario

- Reallocation
  - Carol Adams holds a Wildlife/Fisheries Tech I position. The position has been reallocated to a Wildlife/Fisheries Tech II. Her current salary is $33k. She is approved for an increase to $36,300 (a 10% increase), but funds are only available for 5% ($34,650) at this time. Create the applicable Actions and transactions to indicate that Carol has the Reallocation and new salary, and also that the extra $1,650 is reserved.
- Assume that the Workflow process was completed.

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State of North Carolina
Office of the State Controller

**Notes:**

The instructor will discuss the steps (which are shown in your Exercise Guides) that are needed to complete the above scenario. In the training database it was not possible to create reallocated positions in order to demonstrate the process. However, as you read the steps you will recognize that they are very similar to those that you used in *PA310* to execute a Range Revision.

## Activity:

BEACON North Carolina Office of the State Controller

- Answer the questions in your Exercise Guide pertaining to Reallocation.

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State of North Carolina
Office of the State Controller

**Notes:**

## Lesson Review

In this lesson, you learned to:

- Describe the Reallocation process and associated reasons for the Action
- Enter the applicable data to initiate and complete a Reallocation Action
- Identify the position adjustment that must be made prior to initiating a Reallocation
- Describe the additional steps needed when funds are not available

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State of North Carolina
Office of the State Controller

**Notes:**


Course Map
BEACON
North Carolina
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Lesson 1: PA310 Review
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Lesson 3: Work Against
Lesson 4: Leave of Absence
Lesson 5: Career Progression
Lesson 6: Reallocation
Lesson 7: Dual Employment
Lesson 8: Additional Actions
Lesson 9: Course Review
SLIDE 80
State of North Carolina
Office of the State Controller

**Notes:**

## Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe the four scenarios when dual employment is used
- Identify the duties of the borrowing and parent Agencies
- Describe the Dual Employment policies

SLIDE 81

State of North Carolina
Office of the State Controller

**Notes:**

## Dual Employment

Dual Employment – 4 scenarios:

1. BEACON to BEACON (ITS to REVENUE)
2. BEACON Employee Performing Dual Employment at Non-BEACON Agency (DOT to NCSU)
3. Non-BEACON to BEACON (NCSU to DOT)
4. Non-BEACON to Non-BEACON (NCSU to UNC)

Agency responsibility:

- Parent Agency must be aware of benefits consequences for any employee who accepts dual employment
- Parent and Borrowing Agency must sign agreement prior to employee accepting dual employment

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State of North Carolina
Office of the State Controller

**Notes:**

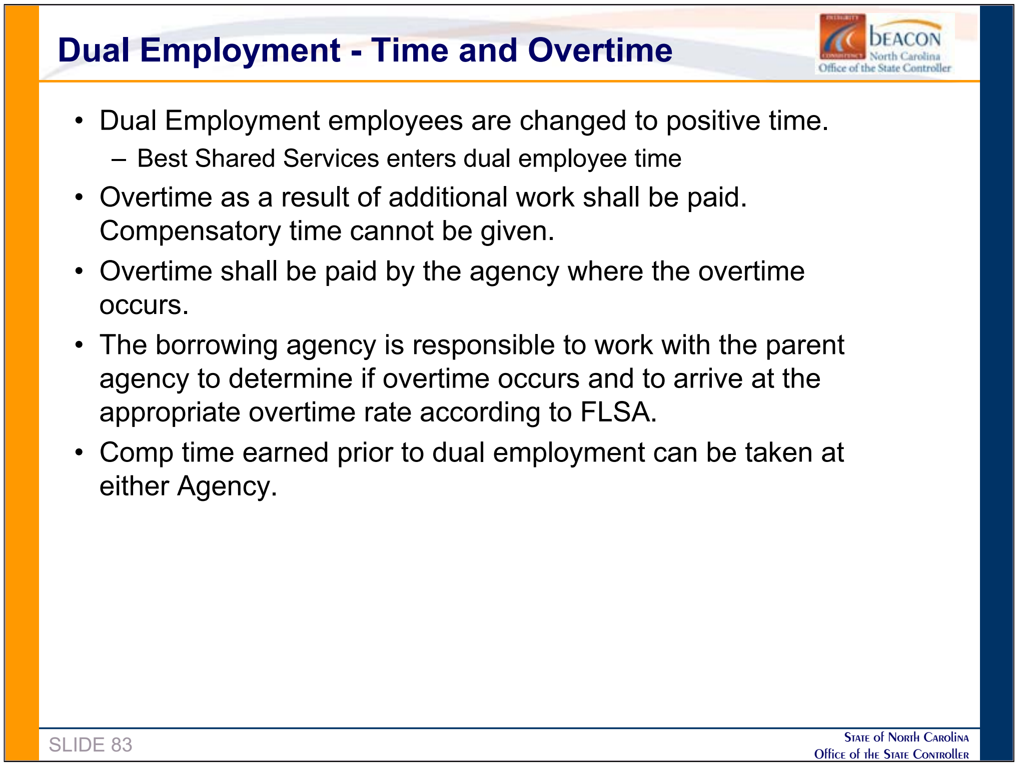
There are basically four scenarios when the dual employment process is used. They are listed above.

All dual employment (except Quick Entry) will be processed by BEST Shared Services. The information in this lesson is to provide you with a basic understanding of the processes and policies. When dual employment involves a non-BEACON to BEACON agency, BEACON Agency HR will execute a Quick Entry Action to assign the employee to the position. When the dual employment involves a BEACON to BEACON agency, BEST Shared Services will assign the holder (employee) to the position and then create infotype 554 – Hourly Rate per Assignment on the employee.

Because BEACON is an integrated system, time, benefits and payroll are all affected by dual employment (unless the employee is hired into the borrowing agency as a temporary). In BEACON, the hours of both jobs are combined to determine benefits and time. That is why it is important for the Parent and Borrowing agency to sign the agreement **before** the employee begins working dual employment.

The Parent agency must now be aware that if one of its employees works dual employment and becomes eligible for benefits (based on extra hours worked), there will be a cost to the Parent agency. In the past, the number of hours the employee worked at the borrowing agency didn't matter.

For details, see the *Dual Employment Process, Dual Employment Procedures for Agencies*, and the *Dual Employment Agreement* located online at BEACON University, under HR, PA, Job Aids.




**Time**

Employees are changed to positive time when performing Dual Employment. BEST Shared Services will enter the employee's time.

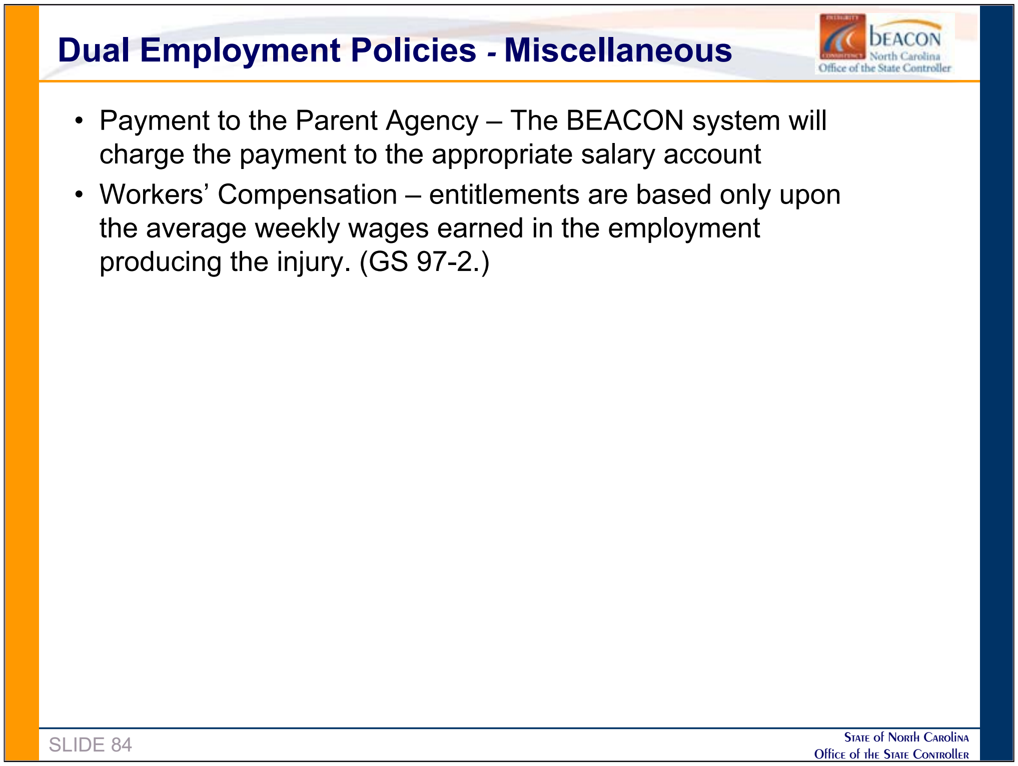
**Overtime –**

- When overtime occurs as a result of additional work, it shall be paid. Compensatory time cannot be given.
- Overtime shall be paid by the agency where the overtime occurs. This is based on the standards expressed in the Dual Employment Agreement signed by the employee and both agencies.
- It is the responsibility of the Borrowing agency to work with the Parent agency to determine if overtime occurs and to arrive at the appropriate overtime rate according to FLSA. To calculate "premium rate ," add hourly rates including all non-discretionary payments (i.e. Shift premium, weekend premium) and divide by standard hours.

**(Comp Time) Agreement of Both Agencies**

Both agencies shall agree that comp time earned prior to the Dual Employment Agreement as well as leave can be taken in either agency, not just the agency where earned.

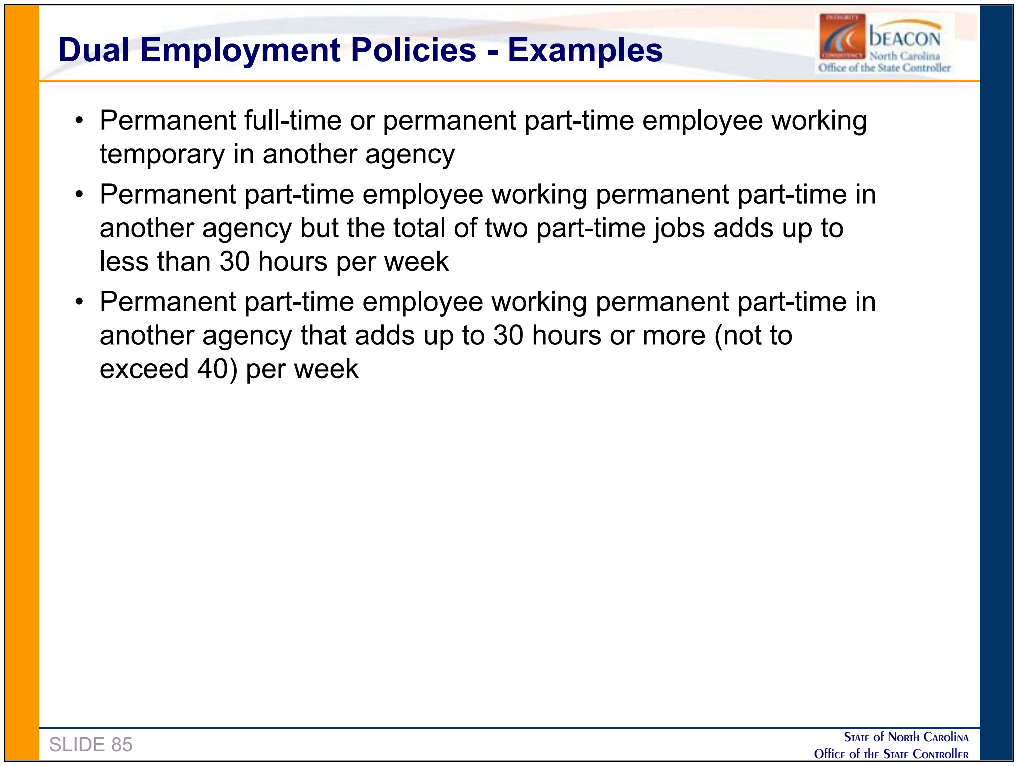
**Notes:**




**Notes:**

**Payment to the Parent Agency** - If both agencies are under the BEACON HR/Payroll System, it will no longer be necessary to send a check to the Parent agency. The BEACON system will charge the payment to the appropriate salary account as shown on the approved Dual Employment Form.

**Workers' Compensation** - When an employee who holds two separate jobs, is injured in one of them, the employee's Workers' Compensation entitlements are based only upon the average weekly wages earned in the employment producing the injury. (GS 97-2.) Over 40 hours paid - weighted average. Average weekly wage will be manually calculated and provided to the Workers' Compensation specialist.




**Notes:**

Below are examples of how dual employment affects benefits and time:

**Permanent full-time or permanent part-time employee working temporary in another agency:** A typical dual employment situation involves a permanent full-time or part-time employee in one agency doing temporary work for another agency. The pay is typically a flat amount paid either in a lump sum or paid monthly over the course of employment. The pay may also be an hourly rate. Benefits are paid by the full-time, 30- hour or more position.

**Permanent part-time employee working permanent part-time in another agency but the total of two part-time jobs adds up to less than 30 hours per week:** Handle as regular dual employment. The benefits involved are leave, NC Flex, 457 Savings Plan. If the employee works as much as 20 hours per week in one agency, the employee is entitled to leave benefits in that agency. The leave accrual and usage will have to be based on the standards expressed in the Dual Employment Agreement signed by the employee and both agencies.

**Permanent part-time employee working permanent part-time in another agency that adds up to 30 hours or more (not to exceed 40) per week:** This type is different from other dual employment. The same approval is required. However, Parent agency must be willing to pay its share of benefits. In this situation the employee would be eligible for full benefits. Both agencies must be willing to pay their pro rata share of retirement, health insurance, etc. If this arrangement cannot be worked out then the additional employment must be as a ***temporary*** appointment. Parent agency owns the one leave record. Borrowing agency sends paper copy of timesheet to Parent agency so that Parent agency can bill Borrowing agency. If Parent agency is in BEACON the time sheet is forwarded to BEST Shared Services for entry.

## 7.1 - Activity

BEACON North Carolina Office of the State Controller

- Answer the questions in your Exercise Guide pertaining to Dual Employment.

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STATE of NORTH CAROLINA
Office of the STATE CONTROLLER

## Notes:

## Lesson Review

In this lesson, you learned to:

- Describe the four scenarios when dual employment is used
- Identify the duties of the borrowing and parent Agencies
- Describe the Dual Employment policies

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State of North Carolina
Office of the State Controller

**Notes:**


Course Map
BEACON
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Lesson 9: Course Review
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State of North Carolina
Office of the State Controller

**Notes:**

## Lesson Objectives

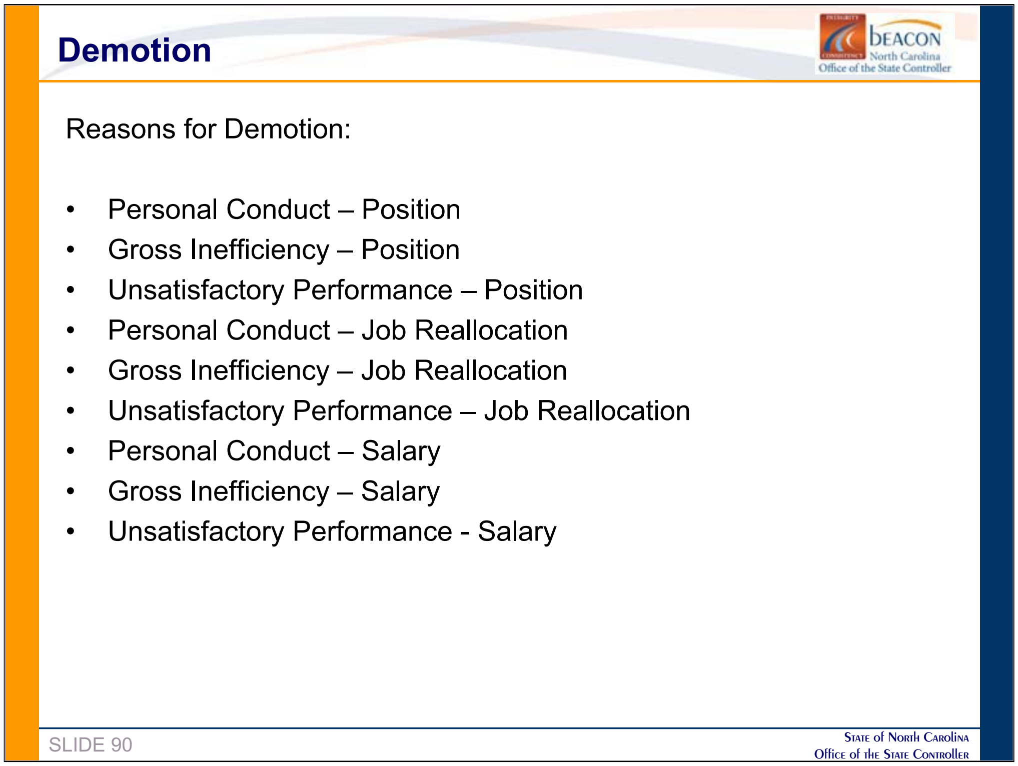
BEACON North Carolina Office of the State Controller

- Upon completion of this lesson, you should be able to identify additional Actions that occur in the life cycle of an employee such as:
  - Demotion
  - Investigatory w/Pay
  - Suspension
  - Cancel Salary Adjustment

SLIDE 89

State of North Carolina
Office of the State Controller

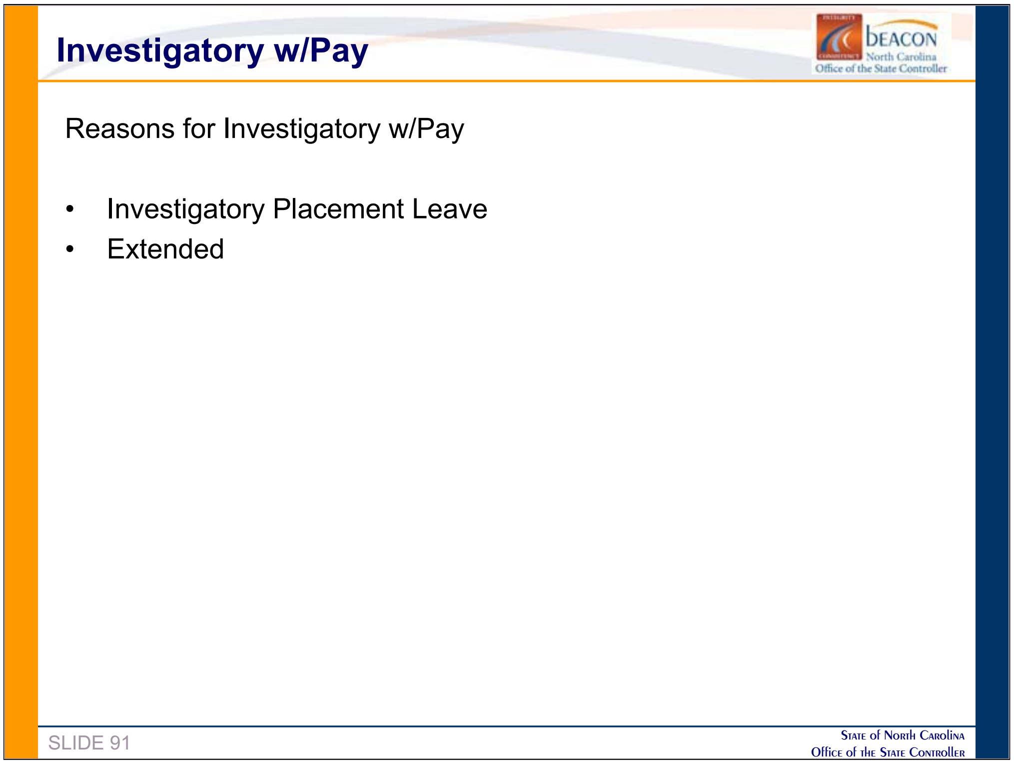
**Notes:**




**Notes:**

**Demotion** is a change in status resulting from assignment to a position assigned a lower salary grade. The action is a demotion if the change in status results from inefficiency in performance or as a disciplinary action. All necessary disciplinary paperwork must be approved prior to the demotion process by the appropriate authorities.

Either skip or delimit the objects on loan depending upon your agency's policy.




**Notes:**

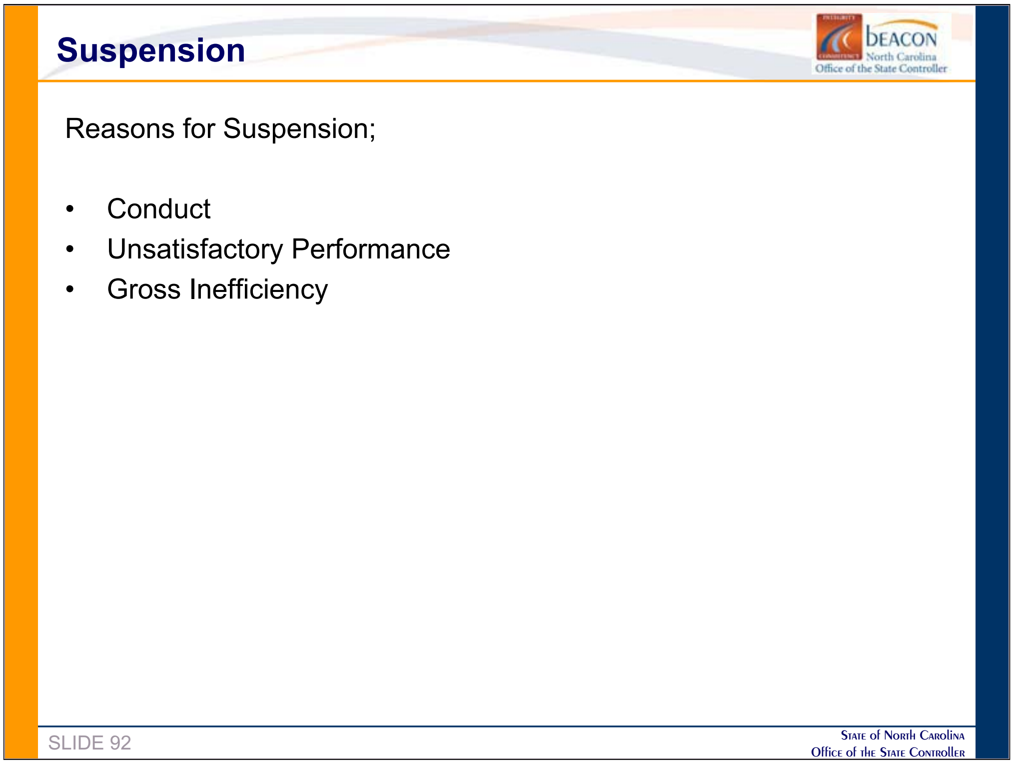
**Investigatory with Pay**

An employee may be placed on Investigatory Status with Pay to allow the agency adequate time to investigate the validity of the allegations of unsatisfactory performance/unsatisfactory conduct. If allegations are confirmed Agency will determine what further disciplinary action may be warranted.

When an employee is placed on leave with pay, his/her leave balance is not used. Code 9540 - *Other Manager's Approved Leave* should be entered on the timesheet. Follow agency policy for approvals.

Use the *Monitoring of Tasks (0019)* infotype to remind you about the return date.

Either skip or delimit the objects on loan depending upon your agency's policy.



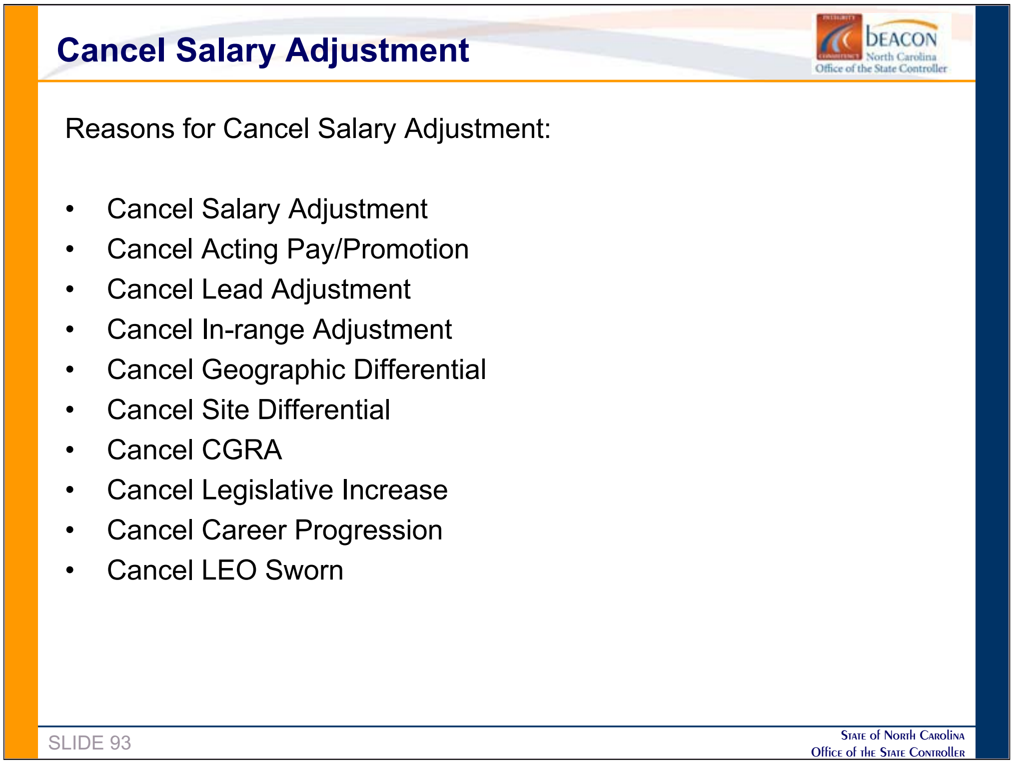

**Suspension**

The removal of an employee from work for disciplinary reasons ***without paying*** the employee.

Since it is presumed that the employee will return to work you would use the *Monitoring of Tasks (0019)* infotype to remind you about the return date.

Either skip or delimit the objects on loan depending upon your agency's policy.  Follow your agency policy for approvals.

**Notes:**




**Notes:**

**Cancel Salary Adjustment**

A **Cancel Salary Adjustment** is a decrease in an employee's salary within the employee's current salary range and within the agency where the employee is currently employed.

The same reasons that existed to give an employee a salary adjustment also exist to cancel the adjustment (with the obvious exception that the word *cancel* precedes it). For example, you give an employee an *acting pay* salary adjustment and then decide to cancel the action by selecting *Cancel Acting Pay*.

## Lesson Objectives

- Upon completion of this lesson, you learned to identify additional Actions that occur in the life cycle of an employee such as:
  - Demotion
  - Investigatory w/Pay
  - Suspension
  - Cancel Salary Adjustment

SLIDE 94

State of North Carolina
Office of the State Controller

**Notes:**


Course Map
BEACON
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Lesson 1: PA310 Review
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State of North Carolina
Office of the State Controller

**Notes:**

## Course Review

BEACON North Carolina Office of the State Controller

In this course, you learned to:

- Define key terms and concepts
- Hire an employee from a Non-BEACON Agency
- Transfer an employee within a BEACON Agency or to a different BEACON agency
- Describe Work Against rules and processes
- Describe various reasons for a Leave of Absence and determine when each are applicable to use
- Reinstate an employee from Leave of Absence
- Execute a Career Progression
- Describe how to process a Reallocation and reserve funds
- Describe Dual Employment
- Use additional Actions associated with an employee

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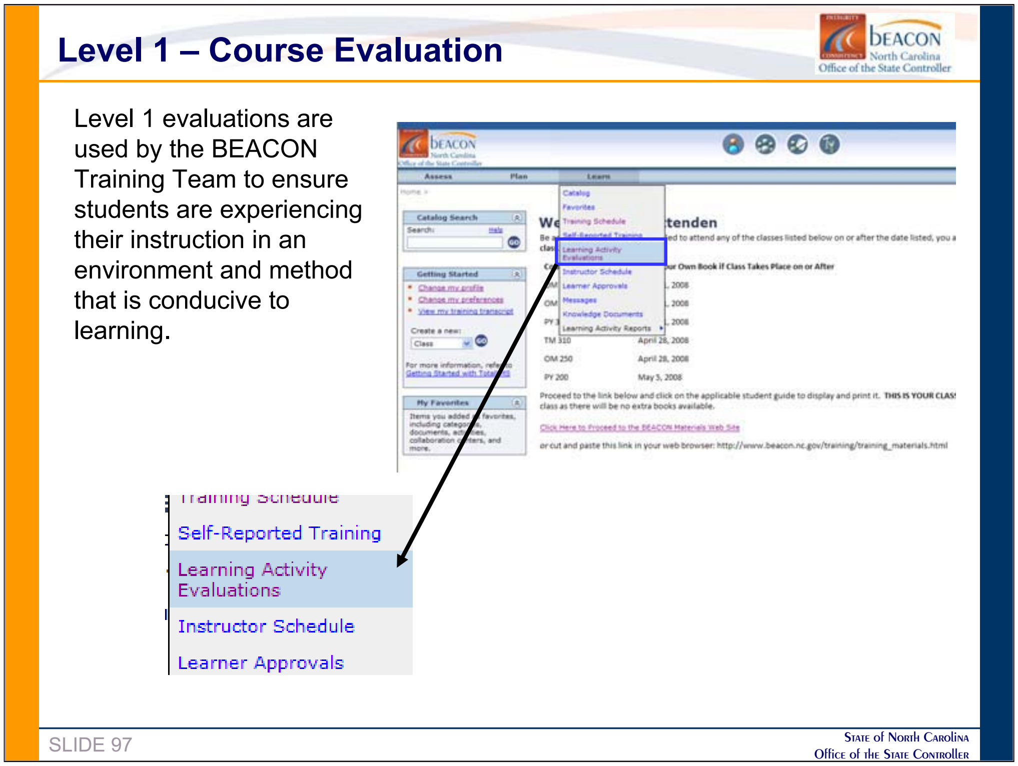
State of North Carolina
Office of the State Controller

**Notes:**

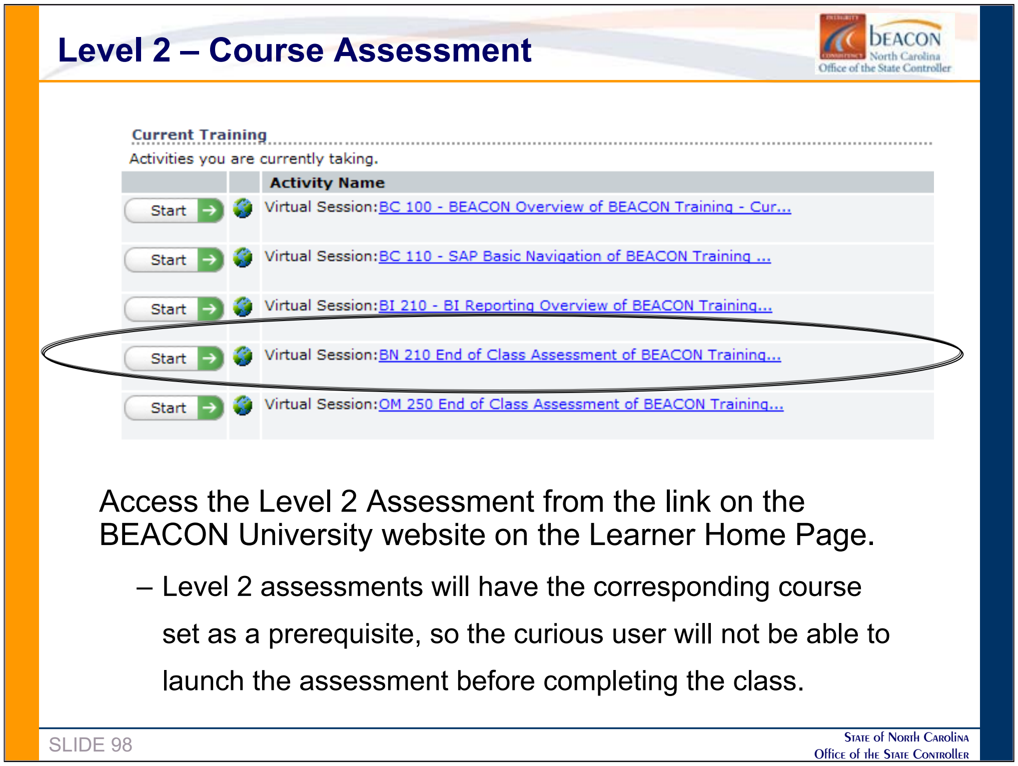



**Level 1 Evaluations**

The Level 1 evaluation for 100 and 200 level classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

**Notes:**




## Notes:

The assessment is listed on the Learner Home Page on the BEACON University web site.

Locate the correct End of Class Assessment by verifying the Course ID Number. Click on the green arrow. The assessment will be displayed.

## Next Steps

- Monitor BEACON communication
  - BEST Shared Services web site (especially the Updates tab)
  - URL: http://www.ncosc.net/BEST/
- Review conceptual materials
- Access BEACON Help
  - Access from an SAP transaction
  - URL: http://help.mybeacon.nc.gov/beaconhelp
- Practice what you've learned
  - URL: https://mybeacon.nc.gov
  - Client 899
  - Use your current NCID user name and password

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State of North Carolina
Office of the State Controller

**Notes:**

Continue to monitor updates on the BEACON University website for information regarding the project and future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

**Want to practice what you have learned from your desk?**

- Follow the link provided above to access the training client on the BEACON website. The training client is number 899. You will be denied access to other training clients, so ensure you enter the correct client number before attempting to log on for your practice session. Your current NCID user name and password are used to access the practice environment.

**Need transactional assistance?**

- Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.


BEACON
North Carolina
Office of the State Controller
CONGRATULATIONS
You have completed the course
Please complete your course evaluation!
SLIDE 100
State of North Carolina
Office of the State Controller

**Notes:**